

Volunteer Income Tax Assistance (VITA) Program Report 2023

Program Overview:

The Volunteer Income Tax Assistance (VITA) program at Western New Mexico University has continued its mission of providing essential tax preparation services free of charge to low-income households, students, and senior citizens. This year, we focused on enhancing the accessibility and efficiency of our services to ensure a streamlined experience for both clients and volunteers.

Participation and Training:

This year, the VITA program was supported by 12 dedicated volunteers, coordinated by Richard Mubanga. Each volunteer completed a rigorous two-week training course that covered individual taxation principles and the IRS regulations applicable to different filing statuses, income brackets, and ages. The training also included detailed sessions on how to effectively use the VITA Tax Slayer software for tax preparation and transmission. After the theoretical course, the volunteers were required to pass a certification exam with at least an 80% score to proceed to the practical, hands-on phase of tax preparation.

Tax Preparation Process:

Our tax preparation processes this year was methodical and thorough. It began with the volunteers collecting all necessary documents from the clients using an intake form that helped understand each taxpayer's unique tax situation. The volunteers then verified the identities of the taxpayers using official documents to ensure compliance and security. Once the paperwork was in order, the volunteers prepared the tax returns and submitted them for a secondary review to ensure accuracy and completeness. A different volunteer conducted this review to maintain objectivity and precision. The final step involved the taxpayer verifying and signing off on their return before it was officially transmitted to the IRS. We also ensured that each taxpayer received hard copies of their filings for their records.

Impact and Outcomes:

During this tax season, our team prepared a total of 439 returns. Of these, 384 were accepted, 30 were not transmitted, and 25 were rejected, resulting in an overall acceptance rate of 87%. The primary reasons for the rejections and non-transmissions included incomplete submissions, such as the absence of correct Social Security Numbers and issues with dependent claims. The total federal refunds amounted to \$602,386, with state refunds adding up to \$135,006, bringing the total state and federal refunds to \$737,392. Our services extended across several states, including New Mexico, California, Nevada, Colorado, Arizona, and Washington.

Client Demographics and Reach:

This year's program successfully served a diverse demographic, focusing on individuals and households earning \$57,000 or less per year. Our efforts not only provided financial relief to these taxpayers but also enhanced their understanding of tax responsibilities and entitlements.

The VITA program at Western New Mexico University has once again demonstrated its invaluable impact on the community and its vital role in the educational journey of our student volunteers. By offering hands-on experience in a real-world environment, the program helps prepare the next generation of tax professionals while also fulfilling our commitment to serving those in need within our community.

Reflecting on this year's Volunteer Income Tax Assistance (VITA) program at Western New Mexico University, we can proudly say it served as both a crucial community resource and a practical learning environment for our student volunteers. With an 87% acceptance rate for returns, the program not only supported vulnerable populations but also enhanced our students' professional development. Looking forward, we are committed to expanding our reach and refining our processes to further improve our services and educational impact. The VITA program continues to embody the dual values of service and education, proving indispensable to both our community and our students' futures.

Thank you!

Richard Mubanga

10/02/2024