



Guidelines for Volunteers To Prepare Their Own Returns On-Site

Following our peak traffic of the season, volunteers can file their own returns at one of the tax sites. Here is how the process works for volunteers wanting to do their own return at the tax sites.

Eligibility:

- You must be an active volunteer for the current tax season to file your own return.
- Your income can be any amount, BUT your return must otherwise be in-scope for the Tax Help program.
- To prepare your own return, it must be within your level of certification. (If your return requires a higher certification, you can ask another volunteer to prepare your return, but you'll need to wait in line.)

Requirements:

1. Serve any clients waiting in line and communicate with the site manager to check that it's a good time before starting your own return.
2. Sign in on the client sign-in sheet to avoid any confusion for the site manager who is matching up names with envelopes at closing time.
3. Fill out all paperwork, including the processing envelope and intake form.
4. Get a quality review from another preparer just as you would for any other return.
5. Sign the 8879 and put your complete envelope with the rest of the day's returns.

Notes:

- You should not take a computer from another volunteer to do your own return – in other words, please don't stay after your shift and use a computer if there is another volunteer waiting for that spot.
- If your return requires a higher certification than you have, you can ask a volunteer with the appropriate certification to prepare your return. If there is a line for that certification, you'll need to wait your turn.
- If your income is higher than our regular client maximum, include a note in the return to clarify that you are exempt from the income limit as a Tax Help volunteer. This is very important in case we are audited.

MyFreeTaxes.com

If your return is out-of-scope or if you just don't want to wait in line, another option is to prepare your return using online software that benefits the Tax Help program. The software is free for tax returns with less than \$66,000 in income. For higher incomes, fees will apply.

The link is: www.myfreetaxes.com

Every return completed for zip codes within our service area (including our Dallas sites) is counted by the IRS as part of the Tax Help program's impact. Part of our IRS grant requires us to promote online self-prep, so this helps our program. Please share the link with your friends and family!