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Innovative approach allowed free tax services to continue during COVID-19

When 93-year-old Waukesha, Wis. resident Florence Krueger's appointment with the Volunteer Income Tax Assistance and Tax Counseling for the Elderly (VITA/TCE) program was canceled back in March due to COVID-19, it did not cancel her need for tax preparation assistance.

Working with Florence and her son Ed Krueger, the Wisconsin Department of Revenue (DOR) found an open appointment time at the newly open VITA/TCE site in the Stoughton Area Senior Center in Stoughton, Wis.

"We had to suspend operations at almost all our VITA/TCE program sites earlier this year for the safety of the public and our volunteer staff," said Wisconsin VITA/TCE Coordinator Juan Carlos Reyes. The July 15 tax filing deadline extension helped many individuals better manage during this unprecedented time, but persons with lower income and the elderly who qualify for and rely on the free VITA/TCE service still needed help.

This prompted program volunteers to step up with creative ways to open sites statewide, including the Stoughton drop-off site. Another site at Waukesha non-profit La Casa de Esperanza allowed taxpayers to drop off their documents at a drive-thru previously used by a bank that occupied the facility. Through their innovation, the La Casa de Esperanza and Stoughton Senior Center sites prepared close to 500 tax returns this tax season.

"We are thankful for the hard work and dedication of all these volunteers," said DOR Secretary Peter Barca. "The tax season would not have gone nearly as smoothly for thousands of Wisconsinites without this important public service by amazing volunteers who demonstrated both innovation and bravery."

The VITA program is a cooperative effort by the IRS and many individual states, including Wisconsin. Volunteers trained by the IRS and DOR prepare basic income tax returns for free. The TCE program is supported by AARP. AARP's Tax-Aide volunteers train in cooperation with the IRS and DOR to prepare basic income tax returns for free during tax season. Most of these sites offer free electronic filing.

