



Tony Evers
Governor

Peter W. Barca
Secretary of Revenue

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CONTACT: Patty Mayers, Communications Director
(608) 266-2300 or DORCommunications@wisconsin.gov

COVID-19 couldn't keep volunteer tax preparation team down

When the coronavirus hit early in the 2020 tax season, the CAP Services' Volunteer Income Tax Assistance (VITA) program team suspended free tax preparation services at its Waushara, Waupaca and Portage county sites.

But as the true scope of the pandemic became apparent, CAP Services Lead Tax Assistance Coordinator Connie Henn knew they needed to find a way to reopen and safely serve taxpayers who rely on the free tax assistance program.

"Our program has many dedicated volunteers willing to give their time even in the summer months," said Henn about volunteers willing to give three extra months of service to the July 15 tax filing deadline. The big challenge she said wasn't as much the extra time dedication as it was mustering enough volunteers to serve during the pandemic. Many of their volunteers are older and some have preexisting conditions making them especially vulnerable to the virus. Fortunately, Henn said enough volunteers were able to mask-up and come in, allowing operations to open around mid-May using a total no-contact procedure.

Site coordinators arrived early to sanitize door handles, tables, chairs and commons areas, while making available hand sanitizer and wipes. Secure drop boxes were set at each site for taxpayers to drop off their tax documents. Site coordinators brought the documents to volunteers to work on at physically distanced stations. Completed returns went through an internal quality review process and a second review with the taxpayer via phone or video chat once they received a mailed copy. Once all approvals and signatures were received, the coordinator mailed the return. Henn said even with all the extra steps and fewer volunteers they still served more than 85 percent of taxpayers compared to last year's numbers.

It wasn't just staff and volunteers who made it work either. Taxpayers stepped up to the challenge, adjusting to the new normal. It was a total team effort said Henn, adding that gratitude coming from clients was incredible.

"We received so many compliments and such touching thank you cards. It did our hearts good to know we were so appreciated."

Staff and volunteers hope to be back in person next tax season, while taking with them a bit of ingenuity from this year. "I can certainly see utilizing the drop-box method of obtaining documents to prepare taxes for clients who have a no-contact need," said Henn "This will also be important for volunteers with health issues."

CAP Services, Inc. has been on the frontline of the war on poverty since 1966. CAP, a private, non-profit corporation, offers programs in Marquette, Outagamie, Portage, Waupaca and Waushara counties. Its VITA program is supported by the Community Foundation of Central Wisconsin, National Exchange Bank Foundation and United Way of Portage County. CAP Services is headquartered in Stevens Point, Wisconsin with offices in each of the five counties it serves.

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 free for qualifying taxpayers.



Note: photo and caption on next page.

Photo caption: VITA volunteers pose for a photo after training to become tax preparers. The photo was taken before tax season started and prior to the arrival of COVID-19.

Front Row: Roxanne Estrada, Don Anders, Paula Reedy, Glenn Ehlers, Anne Casey and Joe Marinello

Middle Row: Mary Krause, Paul Theyel, Miriam Pena, Waupaca Co VITA Site Coordinator Diana Czekalski, Waushara Co VITA Site Coordinator Connie Henn and Julie Walker

Back Row: Carol Hermann, Gordon Ovans and Dave Onan

