



# **VITA /TCE Volunteer Orientation**

*Stakeholder Partnerships, Education and Communication*



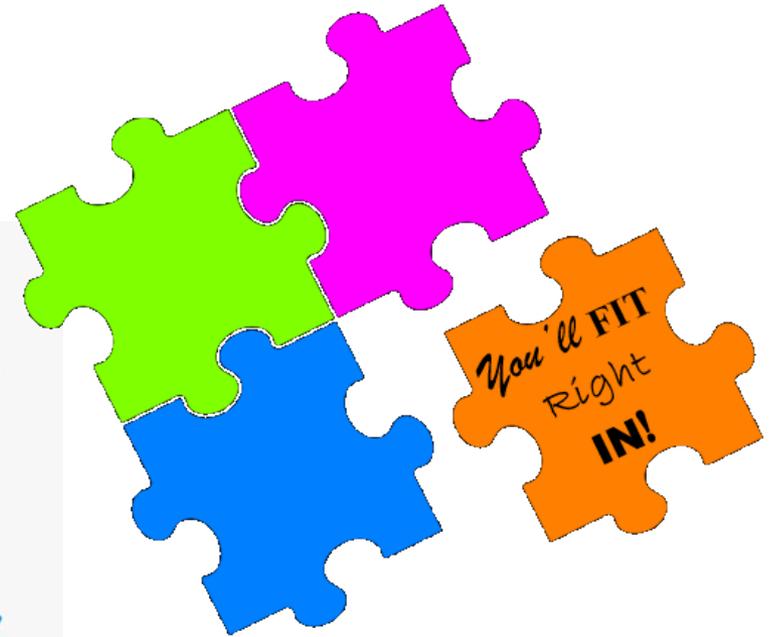
# **VITA /TCE Volunteer Orientation**

## **Welcome**



# VITA/TCE Volunteer Orientation

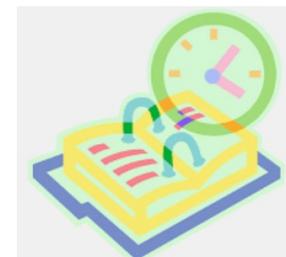
What to expect...





# Types of VITA/TCE Services

- **Face-to-Face (Walk-in/appointment)**
- **Virtual**
- **Drop-off/ Pick-up**
- **Facilitated Self-Assistance (FSA)**





## A Face-to-Face VITA/TCE Site

- Set locations, hours and days
- Interviews are done with taxpayers in person
- Return is prepared with the taxpayer present
- Another volunteer conducts a quality review with the taxpayer present





# **Virtual VITA/TCE**

## **Expands Services**

- **Virtual Intake Sites**
- **Virtual Preparation Sites**
- **Virtual Quality Review Site**





## Drop-off Sites: How they work



- Volunteers verify the taxpayer's identity
- Taxpayer leaves supporting documents and completes forms, to be stored securely and shared with volunteer preparers
- Taxpayer and volunteer complete Virtual consent
- Return preparation and quality reviews are conducted virtually
- Taxpayers return to drop-off sites to authorize e-filing of return and retrieve supporting documents



## **What role do community partners play?**

**Partners provide the support needed to operate tax preparation sites successfully**

- Setting up the tax preparation software and registration to e-file tax returns.
- Securing the equipment needed, computers, printers and Wi Fi connections.
- Recruiting, training and scheduling volunteers.
- Scheduling customer appointments during the filing season.
- Marketing the sites' services to the community.

**Partners are there to provide the support you will need as a VITA/TCE volunteer.**





## Why Volunteer?

- Why did you decide to volunteer?
- How did you hear about VITA/TCE?
- What's your background in serving your community (work or volunteer)?
- How much time do you plan on volunteering during the season?



## **inVITA Friend to Join the Cause**

- **We hope that you will also “inVITA” friend to join you!**
- **When you “inVITA” friend to join you as a VITA/TCE volunteer, you can celebrate each other’s successes.**
- **Strengthen your friendship through shared service to the community!**





# You can choose your volunteer role!

- **Site Coordinator/Site Administrator**
- **Greeter/Screenener**
- **Tax-law certified Volunteer Preparer**
- **Quality Reviewer**
- **Tax Coach**
- **Marketing**
- **Instructor**
- **Translator/ Interpreter**
- **Technology Coordinator**
- **Volunteer Coordinator and Recruiter**
- **Preparer Mentor**

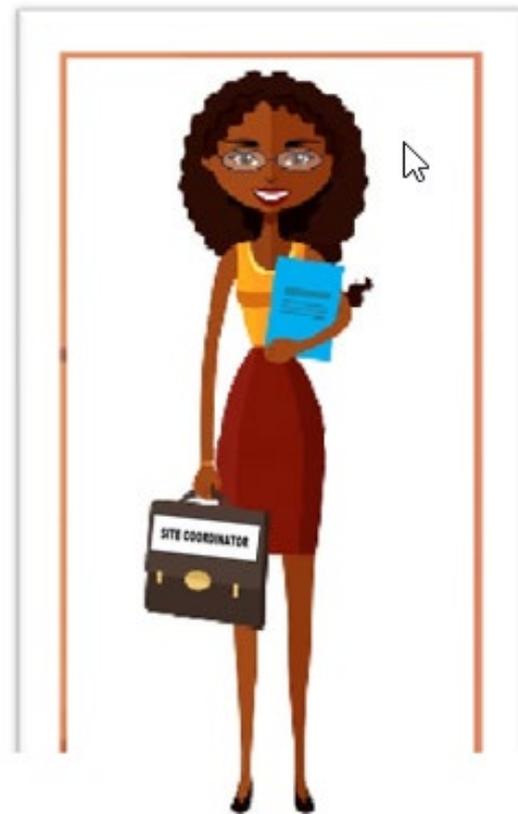




# Site Coordinator/ Site Administrator

- As a Site Coordinator/Site Administrator you are the primary resource for all site operations
- Must have excellent organizational skills and be a team leader

Tax law certification is not always required for this position but is very useful.





# Welcome!



## Greeter/Screenener

- Greets everyone visiting the site to create a pleasant atmosphere
- Screens taxpayers for scope of service needed
- Ensures the taxpayers have all their required documents
- May schedule or confirm appointments

Tax law certification is not required for this position.





# IRS Tax-Law Certified Volunteer Preparer

- Interviews the taxpayer
- Prepares returns within the scope of their training
- Ensures due diligence by advising the taxpayer that they are ultimately responsible for the information on the return



Tax law certification to the Basic or Advanced level is required for this position, based on partner/site needs.



# Quality Reviewer



- Reviews tax returns to ensure they are correct and complete
- Offers training advice to the site coordinator or training coordinator
- Prints the completed return copy for the taxpayer
- May finish the close-out process with the taxpayer

You must be tax-law certified at a level equal to or higher than the level of return you are reviewing.



# Translator/ Interpreter

- Provides language services to customers who are not fluent in English
- Provides sign language services to the hearing-impaired



Basic tax knowledge is helpful, but is not required.





# Tax Coach

Provides tax law assistance and guides taxpayers in preparing their own tax returns.



Tax-law certification to the Basic or Advanced level is required for this position, based on partner/ site needs.





# Marketing

This job can be as creative or simple as you want it to be. You'll work with partners on getting the word out about site locations and services to the community.

- Design and Developments
- Printing
- Handouts
- Posting
- Media Contacts
- Web-based, etc.

This may include: cards, flyers, bulletin boards, or other print products... TV, radio, social media, website, etc. or other interactive media.

**Tax-law certification is not required for this position.**





As a VITA/TCE instructor, you will complete the tax law training certification through the advanced level or higher. You may choose to teach in a typical classroom setting or virtually.

- Present how the sites run and administrative procedures
- Cover the Quality Site Requirements and Volunteer Standards of Conduct
- Teach tax law needed for VITA/TCE
- Hold interactive sessions on how to use the tax software using the Practice Lab

## Instructors



Tax-law certification to the Advanced or higher level is required for this position.



# Technology Coordinators

Do you have experience with computers?

This maybe your fit!



- Set up equipment, printers, computers, etc.
- Establish or maintain internet connectivity
- Troubleshoot hardware and software issues
- Install contingency software
- Maintain secure servers for virtual sites, etc.

Tax-law certification is not required for this position.



# Volunteer Coordinator/ Recruiter

**The work can't get done without volunteers like YOU!**

**A Volunteer Coordinator helps the site find folks with a desire to serve their community through the Volunteer Return Preparation Program.**

- Speaks with senior and professional organizations, non-profit groups, local schools, colleges, and universities to engage their students interested in accounting, business, social work, marketing, computer technology, etc.
- Schedules volunteers at each site for optimum coverage
- Assigns mentors to new volunteers
- Coordinates orientation of new volunteers

**Tax-law certification is not required for this position, but may be helpful.**





# Preparer Mentors

Mentors work with new volunteers as a “buddy”.



They may:

- Be assigned the same work schedule as the new volunteer,
- Allows new volunteers to sit with them and watch the preparation input and process until they're comfortable to prepare returns themselves
- Sits with the new volunteer and watch and assist until the volunteer is comfortable on their own
- Sits near the new volunteer to be available for assistance, should they need help
- Provides feedback to the partner and the new volunteer on additional training suggestions

**Tax-law certification to the Advanced level required for this position.**





## What training will I need?

- All Volunteers
- Instructors, Preparers, Site Coordinators and Quality Reviewers
- Quality Reviewers
- Site Coordinators
- Experienced Returning Volunteers
- Certain Tax Professionals
- Other modules





## What about software training?

- TaxSlayer Pro recorded webinars
- Practice Problems
- Practice Lab



**NOTE:** Training for other software used will be provided by the partner.





## What training methods may be used?

There are a variety of ways this training can be delivered. Your sponsoring Partner or Site Coordinator will provide the details for your specific site location.

- On-line
- Classroom
- Blended
- Self-Study
- Other





- **What's your favorite learning environment?**
- **How do you see yourself fitting into the VITA/TCE program?**
- **How do you see volunteering with VITA/TCE changing your life?**



**Don't Be Afraid...**  
**We've Got Your Back!**

Taking that first step may seem like a giant leap. What are some of your concerns?

- Thrown into the deep end
- Can I ease into this?
- Too much to remember/learn
- I'm not a computer whiz
- What if the client is upset with me?
- What if I make a mistake?



