VITA/TCE Volunteer Orientation

Stakeholder Partnerships, Education and Communication
VITA/TCE Volunteer Orientation

Welcome
VITA/TCE Volunteer Orientation

What to expect...
You Can BE the Difference

- Community Impact
- Helping Families
- Serving for a Cause
Types of VITA/TCE Services

- Face-to-face (walk-in/appointment)
- Virtual
- Drop-off and pick-up
- Facilitated Self-Assistance (FSA)
A Face-to-Face VITA/TCE Site

- Set locations, hours and days
- Interview taxpayers in person
- Prepare returns with taxpayers present
- Quality Review conducted by 2nd volunteer with taxpayers 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?

VITA taxpayers share their experience:

“This is like an annual gift that provides peace of mind.”

“We were provided extra information on resources to use next year that we were unaware of before our visit.”

“Our preparer was fantastic, very calm and patient. He was willing to explain anything I didn’t understand and went out of his way to make sure I got all the deductions owed to me.”

“Vita is a VITAL Program. Please never discontinue this necessary program.”
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 through your shared service to the community.
You can choose your volunteer role!

- Site Coordinator
- Greeter/Screener
- Tax Return Preparer
- Quality Reviewer
- Marketing
- Instructor
- Translator/Interpreter
- Technology Coordinator
- Volunteer Coordinator and Recruiter
Site Coordinator

- 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.
Greeter/Screener

- 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 taxpayers
- Prepares returns within the scope of their training
- Advises taxpayers 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.
Teaches in a typical classroom setting or virtually.

- Presents how sites run and administrative procedures
- Covers the Quality Site Requirements and Volunteer Standards of Conduct
- Teaches tax law needed for VITA/TCE
- Holds interactive sessions on how to use the tax software using the Practice Lab

Tax-law certification to the Advanced or higher level is required for this position.
Volunteer positions that do not require tax law certification:

• Translator/Interpreter
• Technical Support
• Marketing
• Volunteer Recruiter/Coordinator
What training will I need?

- Volunteer Standards of Conduct – All Volunteers
- Intake and Interview and Quality Review
- Site Coordinator
- Tax Law
Link & Learn: https://apps.irs.gov/app/vita/

Introducing the new VITA/TCE Central as your one-stop shop for volunteer training.

VITA/TCE Central lets you find your most frequently used tools on one page—certification tests, training and testing PDFs, evaluations, Practice Lab, instructor tools and more.

Additional training modules (Volunteer Standards of Conduct, Form 13814-C, Intake/Interview and Quality Review Training, optional specialty courses, and Site Coordinator training) are also available on VITA/TCE Central.

Additional Resources
- Tax Software Practice Lab
- Partner and Volunteer Resource Center
- Quality and Volunteer Tax Alerts

We welcome your suggestions for improving your experience, as well as...
What about software training?

- TaxSlayer recorded webinars
- Practice Problems
- Practice Lab

NOTE: Training for other software used will be provided by the partner.
TaxSlayer Practice Lab:
https://vita.taxslayerpro.com/IRSTraining

Password: TRAINPROWEB
Then Create Login Account.
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.

- Online
- 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?
Taking that first step may seem like a giant leap.

You’re NOT Alone...
We’re Here to Help!

Let us ease your concerns...

- You have great online materials for learning
- You have printed reference books
- You don’t have to be a computer whiz
- Volunteers are not liable for honest mistakes
- You can ease into it with experienced preparers
This presentation will be available in recorded format for the next 30 days through your existing link.