VITA /TCE Volunteer Orientation

Stakeholder Partnerships, Education and Communication

Welcome!
Thank you for your interest in volunteering with the IRS Volunteer Income Tax Assistance (VITA) / Tax Counseling for the Elderly (TCE) programs.
These volunteer programs provide a rewarding opportunity to help individuals and families within your community. The goal of these programs is to provide income tax preparation services at no-cost to; low- to moderate-income taxpayers throughout rural and urban areas,
including the elderly, people with disabilities,
limited English-speaking taxpayers, military communities and more.

As a VITA/TCE volunteer, you will have the opportunity to make a difference in your community to help both individuals and families.

This orientation will familiarize you with the roles and responsibilities of a VITA/TCE Volunteer. VITA/TCE is a program available to help taxpayers who may not be able to afford the services of a paid tax preparer. Tax preparation sites are operated by Internal Revenue Service partners and are conveniently located in community centers, libraries, churches/religious centers and senior citizen centers across the country.

Based on the location you are interested in serving , we will provide your contact information to one or more partners in your area. The partner or partners will contact you with additional information.

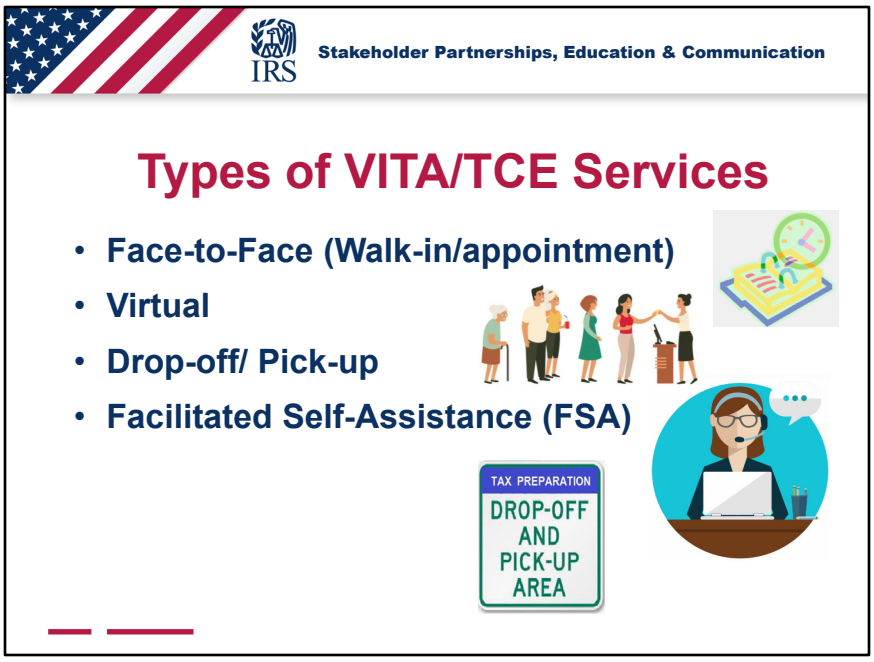
It's important to know a couple things about this process. Often partners independently review potential volunteers to see if they are a good fit for their volunteer programs. Also, depending on the partner and time of year you submit your interest, some partners may be closed or past their training deadline. Partners must work within a timeframe to accomplish many tasks to be ready to prepare returns when filing season opens, typically the end of January.

After filing season some partners close, this could be after April, August or October. Rarely do we have year-round tax preparation partners. Some partners do assist with prior year returns, and other outreach programs that fall under the umbrella of VITA/TCE. We call these services FEAB, Financial Education and Asset Building. For some of our large partners, VITA/TCE is one of many programs in their portfolio used to lift the community out of poverty from work training and placement, credit counselling, food banks and clothing closets and housing.

Once a partner contacts you about your interest and you make the decision to volunteer with a specific partner, that partner or site coordinator should send you the applicable VITA/TCE volunteer training products to prepare you for completing your certification. Some partners may have an application process, and some may not.

The purpose of this orientation is to give you an overview of the VITA/TCE program and its role in the community, your options in volunteering and how your contribution makes a difference. We will also provide you resources to review in the event you have signed up at the time partners are not fully engaged in training or tax preparation. This will allow you to become more familiar with the roles and responsibilities of the VITA/TCE volunteer and make partner orientation smoother.

We will have a short question and answer at the end of this session and schedule a separate question and answer call each month. If you have specific questions you did not have answered today, you can call in and ask your questions at that time.



Let's spend some time looking at the different way's partners provide no-cost tax services.
The most common are:
Face to face
Virtual
Drop-off and Pick-Up
Facilitated Self-Assistance

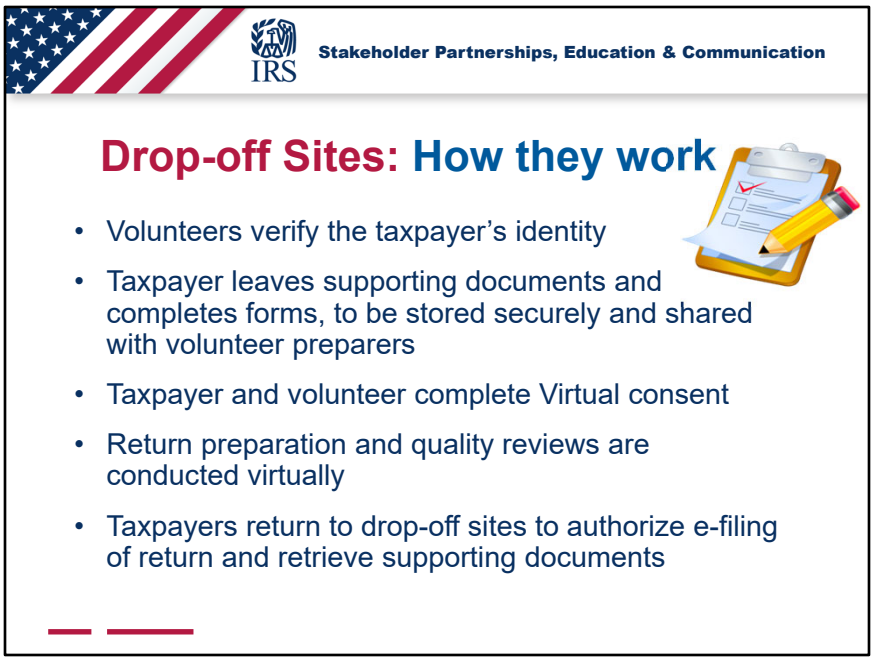
First there is the face-to-face VITA/TCE site.
A certified volunteer is required to conduct an in-person interview with the taxpayer as their return is prepared and quality reviewed.

SPEC offers virtual VITA/TCE to expand access to no-cost tax preparation services for taxpayers who may not have had the opportunity to use Face-to-Face VITA/TCE services due to:

- Location
- Lack of transportation
- Sites operating at capacity
- Insufficient number of Volunteers

Virtual VITA/TCE sites use the same method as face-to-face services, except that the interview, preparation or quality review process is not done in front of the taxpayer. Depending on the make-up of the Virtual site model, one or more of the parts of the tax preparation processes will be performed virtually.

Taxpayers must complete a consent form for this virtual tax preparation process.



So how do drop off sties work?

Volunteers first verify the taxpayer's identity.

Taxpayers are then asked to complete our intake and interview sheet.

Taxpayers are asked to leave their tax documents for use by the volunteer preparers. And don't worry, these documents are securely stored.

Taxpayers are required to complete a consent form for this drop-off process.

The preparation and quality reviews of the tax returns are conducted virtually.

Taxpayers then return to the drop-off sites to authorize e-filing of their tax returns and retrieve their documents.

What role do community partners play?

As we stated in the beginning of this presentation, IRS partners with organizations in your community to provide no-cost VITA/TCE programs. Partners are as unique as your community and may be social service agencies, religious organizations, libraries and community centers. A major partner is AARP Foundation-Tax Aide which sponsors sites throughout the county.

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

- This includes 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 did you decide to volunteer for VITA/TCE?

As you start your volunteer experience, we want to know why you chose to spend your valuable time volunteering with the VITA/TCE Programs.
Many volunteers have told us that VITA/TCE is a great way to contribute to the health of their local community. No-cost tax preparation puts valuable tax dollars back into the local community.

How did you hear about VITA/TCE?
Did you hear about VITA/TCE from a friend, one of our partners or social media? IRS and our partners are busy recruiting volunteers all year long.

What's your background in serving your community?
We are interested to know about other ways you serve your community. Do you work in a helping profession? Do you volunteer with other organizations like your church or local food bank? During your time volunteering you will meet many new people who bring multiple volunteer experiences to VITA/TCE.

How much time do you plan on volunteering during the season?
Volunteers vary the amount of time they can share during the tax filing season. Some volunteer once a week at their sites. Others volunteer for partners with multiple sites and may visit more than one site a week. Your partner will share with you the various

opportunities to choose from to schedule your times to volunteer.

As you begin your experience as a VITA/TCE volunteer, we encourage you to "inVITA" friend to join the cause.

The VITA/TCE certification process can be a challenge, but we know how rewarding it is to help people with their taxes. You can partner with one of your friends to navigate the process.

When you "inVITA" friend to join you as a tax preparation volunteer, you can celebrate each other's successes.

You can strengthen your friendship through your shared service to the community!

You can choose your volunteer role to match your skills, interests, and time commitment. And as you can see, you will be able to find a role that fits you!

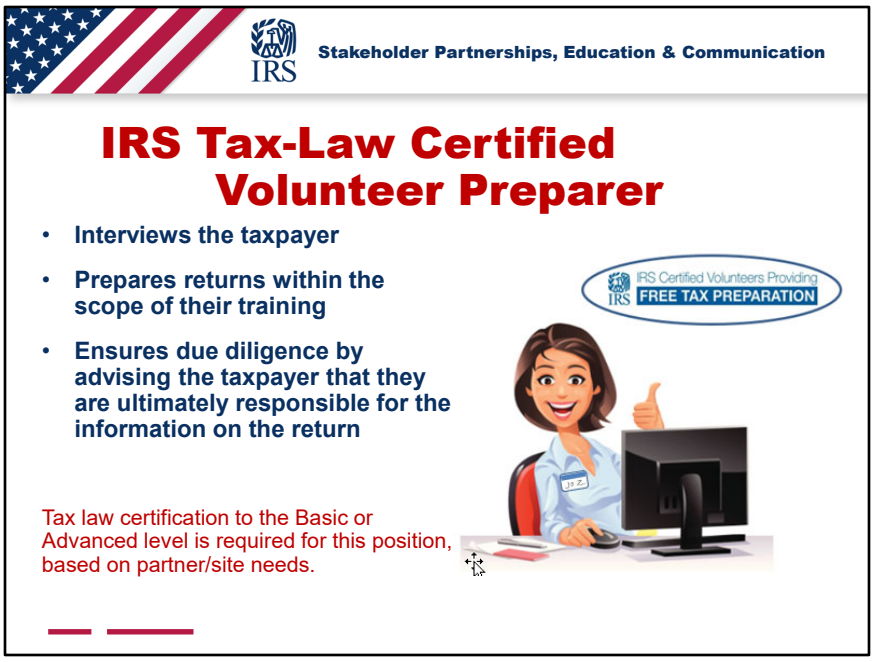
Let’s talk a little bit about each of these opportunities.

As a Site Coordinator or Site Administrator you are the primary resource and must be available to assist with any issues that may arise at the site. You develop and maintain schedules for volunteers to ensure adequate coverage and make sure the site has all the supplies and equipment needed. You must have excellent organizational and leadership skills for this position.

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

Greeters and/or Screeners welcome everyone visiting the site to create a pleasant atmosphere. You also screen taxpayers to determine the type of assistance they need and confirm they have the necessary tax documents to complete their tax returns. Greeters may also oversee scheduling and confirming appointments.

Tax law certification is not required for this position, but you must certify your knowledge of the VITA/TCE Volunteer Standard of Conducts – ethics training. Some site may require additional certifications.



Tax-Law Certified Volunteer Preparers to the actual tax return preparation.

As a preparer, you will interview the taxpayer using our intake and interview sheet to determine if all income, deductions and allowable credits are claimed on the return. You will engage the taxpayer when preparing the tax return to ensure the taxpayer's understanding of the information on the intake sheet.

You will only prepare returns that are within your training certification and within the scope of the VITA/TCE Programs.

It will also be your job to ensure due diligence by advising the taxpayer that they are ultimately responsible for the information on the return.

Tax law certification to the Basic level, at minimum, is required for this position.

If you are the Quality Reviewer, your role is to review tax returns completed by the volunteer tax preparers, ensuring that every taxpayer receives top quality service and that the tax returns are error-free.

Some sites have designated quality reviewers, while others use several preparers for this process.

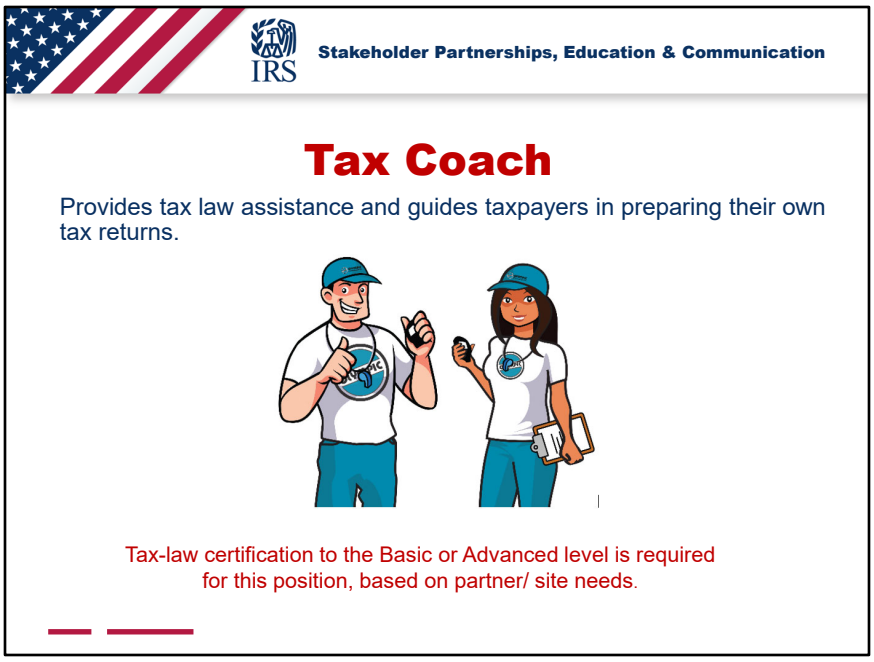
You must be tax-law certified at a level equal to or higher than the level of return you are reviewing.

Some of our volunteers are Translators and Interpreters

Translators provide language services to customers who are not fluent in English. This may be accomplished in-person or by phone.

Interpreters provide sign language services to the hearing-impaired or TTY/TTD-type services.

Basic tax knowledge is helpful but is not required.



As a Tax Coach you would give tax law assistance and guidance to taxpayers in preparing their own tax returns.

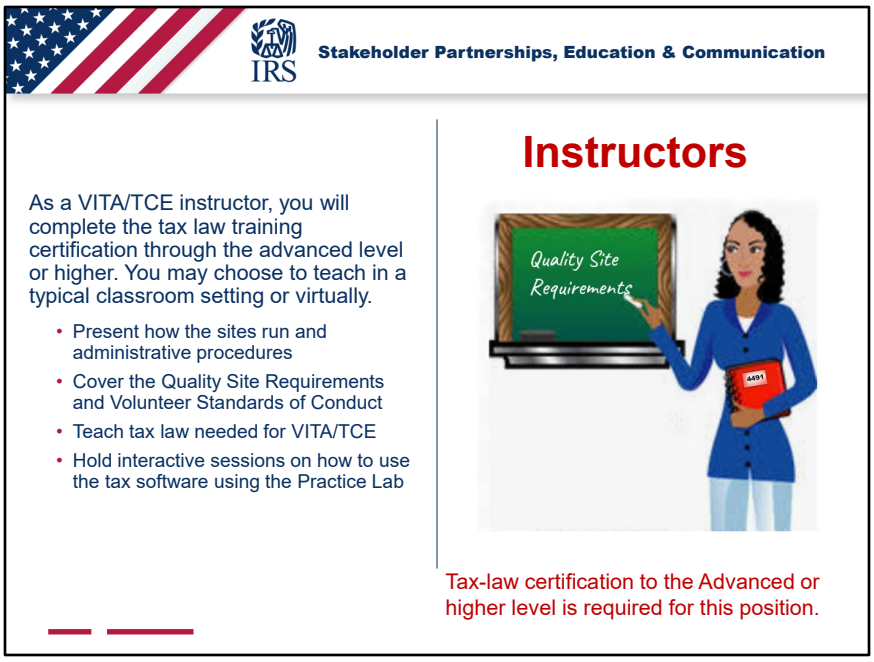
This may be in-person such as at a library or computer lab, or by telephone or other virtual method.

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

Maybe your background is in sales or marketing?
Many partners would love to use those skills to market their tax-preparation locations to the community.

Some partners have developed their own marketing materials and just need assistance getting them out to the public.

Other partners may need your help in developing print products like flyers, signs, or postcards.
Or some may need help with electronic marketing, like video or audio ads for websites, social media, radio or TV spots.



Instructors complete their online certifications in tax law at the advanced level or higher and familiarize themselves with any software updates before they instruct other volunteers.

They can conduct classes online virtually, or in a classroom setting. The training may be broken down into sections, like operations and administration, quality site requirements, and tax law and software.

If you are a CPA, Attorney, Enrolled Agent, Certified Financial Planner, or other non-credentialed tax return preparer needing Continuing Education (CE) Credits, you may be able to earn up to 18 hours of CE credits for volunteering for 10 or more hours!

If you are comfortable with physically setting up computers, printers, cables and the like, or
when we say, “networks, modems, software set-up, or security settings” we’re speaking your language, this may be the job for you!

A technology coordinator helps with equipment for sites that need set-up every time they are open. They also troubleshoot if there is a printer, software, network or other issues that come up at the site.

A volunteer coordinator or recruiter assists the partner or site coordinator in finding volunteers to fill needed positions, helping them get settled in and maintain the weekly schedule for workers.

This may involve;

- Speaking to various organizations that have or need the skills used at the volunteer return preparation site,
- Making sure enough volunteers are available to cover appointments at a site,
- Assigning mentors to new volunteers, and
- Orienting the new volunteers with how their site operates.

We want all volunteers to be valued and provide them with the opportunity to use their skills to serve their communities.

After you've worked a season or two, you might be asked if you'd like to be a Preparer Mentor. You'll guide new volunteers side-by-side in tax preparation, quality site procedures and general administration. Mentors have new volunteers shadow them to learn the site processes.

Mentors will also assist you as you help your first customers, providing guidance and feedback.

What training will I need?

The type of training you will be required to complete depends on the position you are volunteering for and your site's needs.

All Volunteers are required to take Volunteer Standards of Conduct – Ethics training and certify their understanding. This is mandatory for all positions.

Instructors, Preparers, Site Coordinators and Quality Reviewers – are required to take Intake Interview and Quality Review training. Some sites may require greeters and screeners to also complete this training.

Site Coordinators- are required to complete a special site coordinator training just for them. Site Coordinators may also complete tax law training, if they handle electronic filing , answer tax questions, or correct rejected returns.

Tax Law Training is required for all Volunteer Tax Preparers and Quality Reviewers

All volunteer tax preparers must be certified at the Basic or Advanced level.

Some sites may require additional certifications based on the type of taxpayers they serve.

The sponsoring partner or site coordinator will let you know which certifications you must complete to volunteer for their specific site location.

Certain experienced returning volunteers may be able to take the new refresher test available to them. The partner will determine if this is acceptable for their volunteers' needs.

Volunteers who are CPAs, Attorneys, or Enrolled Agents may certify using the Federal Tax Law Updates Test for Circular 230 Professionals. (However, this certification does not qualify for obtaining CE Credits.)

Other available certifications include:

Foreign Student & Scholar
International
Military
Puerto Rico Levels I & II

What about tax software training?

Software Training is required for Volunteer Tax Preparers and Quality Reviewers
Other positions may also require this training, including instructors and Site Coordinators. Training will vary dependent upon the type of software used at the site. Many partners conduct classroom training for new volunteers.
Volunteers using TaxSlayer Pro software will also have access to a Practice Lab where they can learn the software and practice in a stress-free environment.

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 you the details for your specific site location.

- On-line (via webinars, recorded sessions, self-study training)
- Classroom (over one or several days, for new or experienced volunteers)
- Blended (live or virtual classroom, hands-on practice, and self-study)
- Self-Study (online training, SPEC products and publications)
- Other (Tax-Aide and other partners have developed stream-lined learning plans that help you prepare for each tax module's test.)

VITA/TCE Partners provide various types of learning environments such as: online learning, classroom training, combination of online and classroom (blended learning), videos, practice exercises and computer practice lab, etc.

How do you see yourself fitting into the VITA/TCE programs?
Various roles in VITA/TCE are: Marketing, Technology Coordinator, Screener, Greeter, Quality Reviewer, Tax Preparer, Site Coordinator/Recruiter, etc.

How do you see volunteering with VITA/TCE changing your life?
VITA/TCE could change your life. It can increase job and technical skills, improve interpersonal and communication skills, help you make new friends and/or professional contacts, community engagement, personal fulfillment, etc.

If all of this seems a little daunting, don't worry. The IRS and our community partners will set you up for SUCCESS!
That first step may seem like a giant leap, but you'll never be thrown into the deep end to fend for yourself.

- At your site, you will have a coordinator and experienced volunteers to lean on.
- You may be assigned a mentor.
- You have access to the Practice Lab to help you get familiar with the software. It includes practice problems and instructional videos on how to prepare the returns.
- And you will always have volunteer reference materials.

Talk to your volunteer coordinator about opportunities to "ease" into volunteering through;

- Observing an active site,
- Sitting with experienced preparers as they help the clients, or
- Starting off by working as a Greeter.

It may seem like, between the tax law and preparation software, there's a lot to remember.

- But you will always have access to your volunteer guide and other materials AND the certification tests encourage you to use them, just as you would at the site.
- The TaxSlayer Pro software is very user friendly, so you don't have to be a computer whiz and the volunteer guide gives you examples of how to enter information in the software.

There's also no need to worry about making an honest mistake. Most of the time, your mentor or quality reviewer will catch it. AND legally, if you do a return that is within the scope of your training and make an honest mistake, you cannot be held legally liable as a volunteer. (42 U.S. Code § 14503)

We hope that this presentation provided you a better understanding of what the Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) are about. Our Partners can only be successful with good people like you.

During this time of the season most of our VITA/TCE sites are not open for tax preparation services. However, we will be sure to keep your information on file so that we can share your contact information with a partner in your area during our peak volunteer recruiting period, which falls between August and October. If no one contacts you by October, please let us know.

Thank you for your interest and I hope we've answered your questions. If not, we will be hosting Live question and answer sessions. Please check the scheduled dates and times and get those questions ready.

Again, thank you for your interest.