

VITA Volunteer Guide 2017

Greeter

Thank you for joining the Tax Time team! We are excited to have you join our efforts, and are here to help you prepare to serve clients during the tax season.

What now?

Before you volunteer, there are a variety of training and certification requirements that you must meet. To meet these requirements, there are multiple options and resources available. These are all outlined in this guide in a step-by-step process. *In order to train/certify to be a Volunteer Greeter, the steps here should only take a total of 20-30 minutes.*

Training/Certification Steps (Greeter):

Step 1: Complete Volunteer Standards of Conduct Training

- [Ethics Training Video](#):

Our peer coalition, Cuyahoga County EITC Coalition, prepared training videos to explain tax law topics to volunteer preparers. These are *outdated* (produced in 2015), but still provide an excellent understanding of each topic. In order to prepare for the volunteer certification exam (Volunteer Standards of Conduct-VSOC) required to be a greeter, we recommend viewing the video called “Ethics”. Use this link to view the video:

<https://www.youtube.com/watch?v=1OaaYvut5Tc&feature=youtu.be>

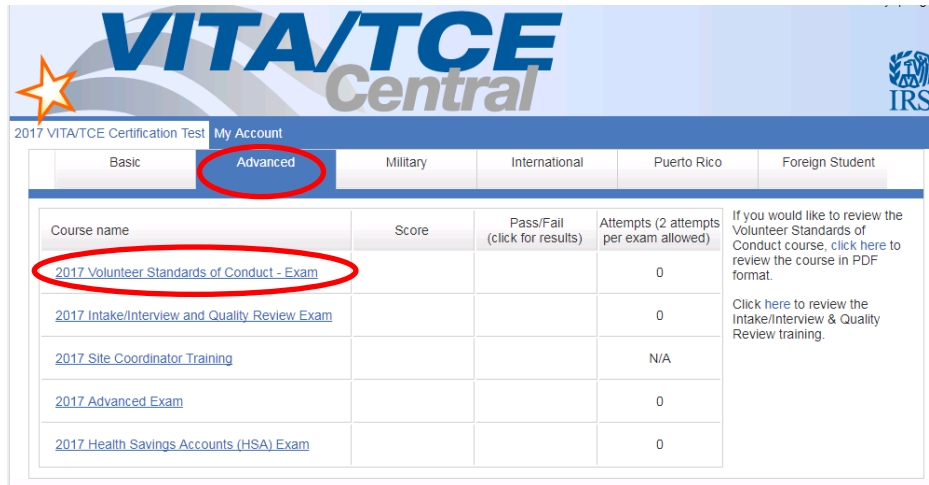
- [IRS Link & Learn Training](#)

Once you have watched the Ethics Training Video, you are ready to take the volunteer certification exam. However, if you would like to review more information on the topic, check out the IRS Link & Learn Training here: <https://www.linklearncertification.com/d/>. Once you navigate to that page, click “VSOC Training”

Step 2: Complete Volunteer Certification

- Visit [Link and Learn Certification](#) to complete your certification exam. If you are a new volunteer, you will need to create an account first.

Once you have created an account, click the “Advanced” tab to see the list of certification tests available:



In order to volunteer as a Greeter, you only need to complete the following exam: **Volunteer Standards of Conduct Exam**. The exam is only 10 questions and will likely take you less than 15 minutes.

Step 3: Volunteer!

Once you've finished the VSOC Exam, electronically sign your "Volunteer Agreement." Open and print your Volunteer Agreement:



Now you are ready to volunteer. We will send out a link for you to register for volunteer shifts in mid-January. Typically, volunteer shifts range from 3-4 hours at a time. Make sure to bring a signed copy of your Volunteer Agreement with you anytime that you volunteer.

Register!

If you have not already, please REGISTER to volunteer at www.taxtimecentralohio.org. This will ensure that you receive email updates related to volunteer training, opportunities, etc.

Have Questions/Concerns?

If you have any questions regarding training or certification, please do not hesitate to contact Tax Time staff at the information provided below:

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