



United Way  
of Central Ohio



## VITA Volunteer Guide 2017

### Tax Preparer

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. Please pick the training options that are best for your schedule and style. *It is important that you begin this process as soon as possible to ensure that you're ready by the end of January!*

#### 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:

Sally Levy, MSW, LSW  
Tax Time Program Manager  
(614) 227-2727  
[Sally.levy@uwcentralohio.org](mailto:Sally.levy@uwcentralohio.org)

#### Register!

Please REGISTER to volunteer at [www.taxtimecentralohio.org](http://www.taxtimecentralohio.org). This will ensure that you receive email updates related to volunteer training, opportunities, etc.

**Thank you for choosing to serve the Columbus community in such a unique way.  
We hope this is a rewarding experience and look forward to working with you this tax season!**

## Step 1: Complete Tax Law Training

First, you'll need to brush up on your tax law. If you are very familiar with taxes, there is no need to go through additional training. If you don't have a background in tax, don't worry! There are several training options available for you:

- **Option 1: Tax Time Training Videos**
  - Our peer coalition, Cuyahoga County EITC Coalition, prepared training videos to explain tax law topics to volunteer preparers. These short videos are *outdated* (produced in 2015), but still provide an excellent understanding of each topic. Each module is about 15 min long. Use this link to view the videos: (<https://taxtimecentralohio.org/volunteer/volunteer-resources>)
- **Option 2: IRS Link & Learn Training**
  - Complete the advanced certification training modules on the IRS Link & Learn Training ([https://apps.irs.gov/app/vita/advanced\\_student.jsp?level=advanced](https://apps.irs.gov/app/vita/advanced_student.jsp?level=advanced))
  - The training modules take most volunteers 10-12 hours to complete, but can be broken up among multiple sessions. We encourage you to go at your own pace and review only the material you are unfamiliar with.
- **Option 3: In-Person Training** (Details/Registration will come via Tax Time email)
  - If this is your first time volunteering, we recommend that you attend a New Volunteer In-Person Training to supplement the online training materials/videos. During these training sessions, we will introduce the structure of VITA tax sites, tax law basics, the tax preparation software (TaxSlayer) and practice some tax law scenarios.
  - If you have volunteered before, but simply want to brush up on any tax law/software updates, you are welcome to attend our Returning Volunteer In-Person Training.

No matter what training option you choose, we recommend you carry the **IRS Publication 4012** with you along the way! An online version can be found here: <https://www.irs.gov/pub/irs-pdf/p4012.pdf>. If you would like this in booklet form, we have these in print for pick up. Simply, email Sally Levy at [Sally.Levy@uwcentralohio.org](mailto:Sally.Levy@uwcentralohio.org) to arrange pick up date/time.

## Step 2: Complete Volunteer Certification

Once you feel comfortable with tax law, you'll need to certify as a volunteer tax preparer. The easiest way to do your certification is to complete the certification tests online from the comfort of your home.

- **Complete your certification online at home**

1. Familiarize yourself with the tax preparation software, TaxSlayer. The [TaxSlayer Practice Lab](#) is now available and provides a simulated VITA/TCE learning environment in the TaxSlayer Pro Online software and is complete with learning tools and TaxSlayer support. It can be accessed by using the following link: <https://vita.taxslayerpro.com/IRSTraining>  
Please use the generic password “**TRAINPROWEB**” to gain access to the lab.
2. Visit [Link and Learn Certification](#) to complete your certification exams.
  - 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.

2017 VITA/TCE Certification Test		My Account			
Basic	Advanced	Military	International	Puerto Rico	Foreign Student
Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	If you would like to review the Volunteer Standards of Conduct course, <a href="#">click here</a> to review the course in PDF format.  Click <a href="#">here</a> to review the Intake/Interview & Quality Review training.	
<a href="#">2017 Volunteer Standards of Conduct - Exam</a>			0		
<a href="#">2017 Intake/Interview and Quality Review Exam</a>			0		
<a href="#">2017 Site Coordinator Training</a>			N/A		
<a href="#">2017 Advanced Exam</a>			0		
<a href="#">2017 Health Savings Accounts (HSA) Exam</a>			0		

- In order to volunteer as a tax preparer, complete the following three exams:
  - a. Volunteer Standards of Conduct Exam
  - b. Intake/Interview and Quality Review Exam
  - c. Advanced Exam
- **Complete your certification online at our [In-Person Open Lab](#):**  
We will offer an In-Person Open Lab if you are interested in taking the exam online, but in a supported environment. We will have several experienced VITA volunteers there to help get you through any tough questions or tax scenarios you are having trouble with. (Details/Registration will come via Tax Time email)

If you are new to VITA, we also recommend using the printed training materials and certification test to prepare for taking the test online. Once you do the certification tests on paper, it is easy transfer of the answers to the online test. Just keep in mind -- it is not an exact transfer so make sure to still read through the online test questions and select the correct answers. Here is the link to the print version of the certification test/retest (**IRS PUB 6744**): <https://www.irs.gov/pub/irs-pdf/f6744.pdf>. We also have print versions of these booklets available for pick up. Contact Sally Levy at [Sally.Levy@uwcentralohio.org](mailto:Sally.Levy@uwcentralohio.org) to arrange pick up.

### Step 3: Volunteer!

Once you've finished all three exams, electronically sign your "Volunteer Agreement." Open and print your Volunteer Agreement:

The screenshot shows the VITA/TCE Central website interface. At the top, there is a navigation bar with the VITA/TCE Central logo and the IRS logo. Below the navigation bar, there are tabs for 'Basic', 'Advanced', 'Military', 'International', 'Puerto Rico', and 'Foreign Student'. The 'Basic' tab is selected. The main content area features a table with the following data:

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	
<a href="#">2017 Volunteer Standards of Conduct - Exam</a>	100.00 %	<a href="#">Pass</a> <a href="#">Print Certificate</a>	1	<input type="checkbox"/> You may sign your Volunteer Agreement electronically by checking this box
<a href="#">2017 Intake/Interview and Quality Review Exam</a>			0	<a href="#">Click here to open and complete your Volunteer Agreement. Click Print from the file menu to print the page.</a>
<a href="#">2017 Site Coordinator Training</a>			N/A	Save the Volunteer Agreement for your records.
<a href="#">2017 Basic Exam</a>			0	If you would like to review the Volunteer Standards of Conduct course, <a href="#">click here</a> to review the course in PDF format.
<a href="#">2017 Health Savings Accounts (HSA) Exam</a>			0	

Two red callout boxes with arrows pointing to the interface provide instructions:

- The first callout box points to the checkbox in the first row of the table and contains the text: "Check here to electronically sign your Volunteer Agreement."
- The second callout box points to the link in the second row of the table and contains the text: "Click here to 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.