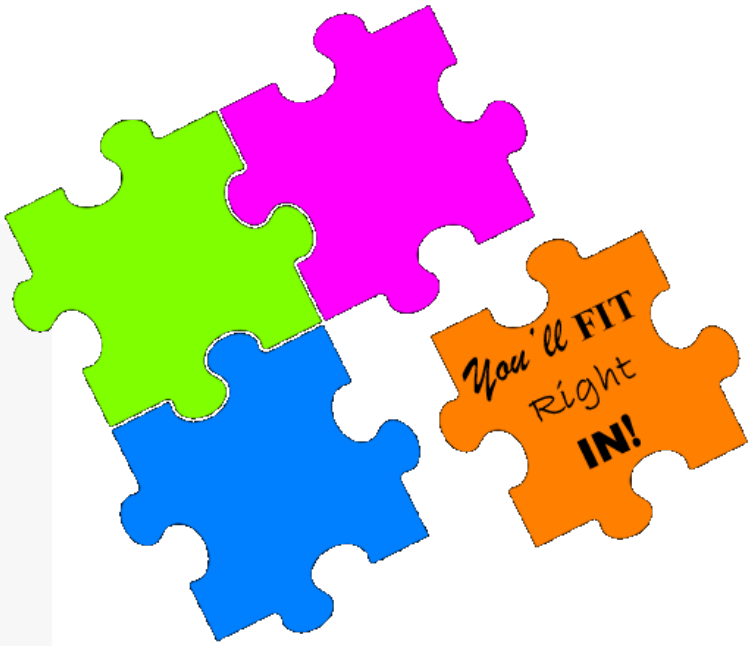
VITA/TCE Volunteer Orientation

Taxpayer Services Division

Publication 5451 (Rev. 10-2024) Catalog Number 74931U Department of the Treasury **Internal Revenue Service** www.irs.com

VITA/TCE Volunteer Orientation

What to expect...

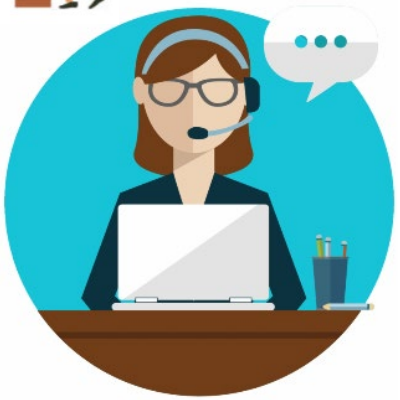


You Can BE the Difference

- 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.

Welcome!

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 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.

Instructor

Teaches in a typical classroom setting or virtually.

- Presents how sites operate and administrative procedures
- Covers the Quality Site Requirements and Volunteer Standards of Conduct
- Teaches tax law needed for VITA/TCE
- Holds interactive training using the tax software in 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:

- Greeter/Screener
- 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:

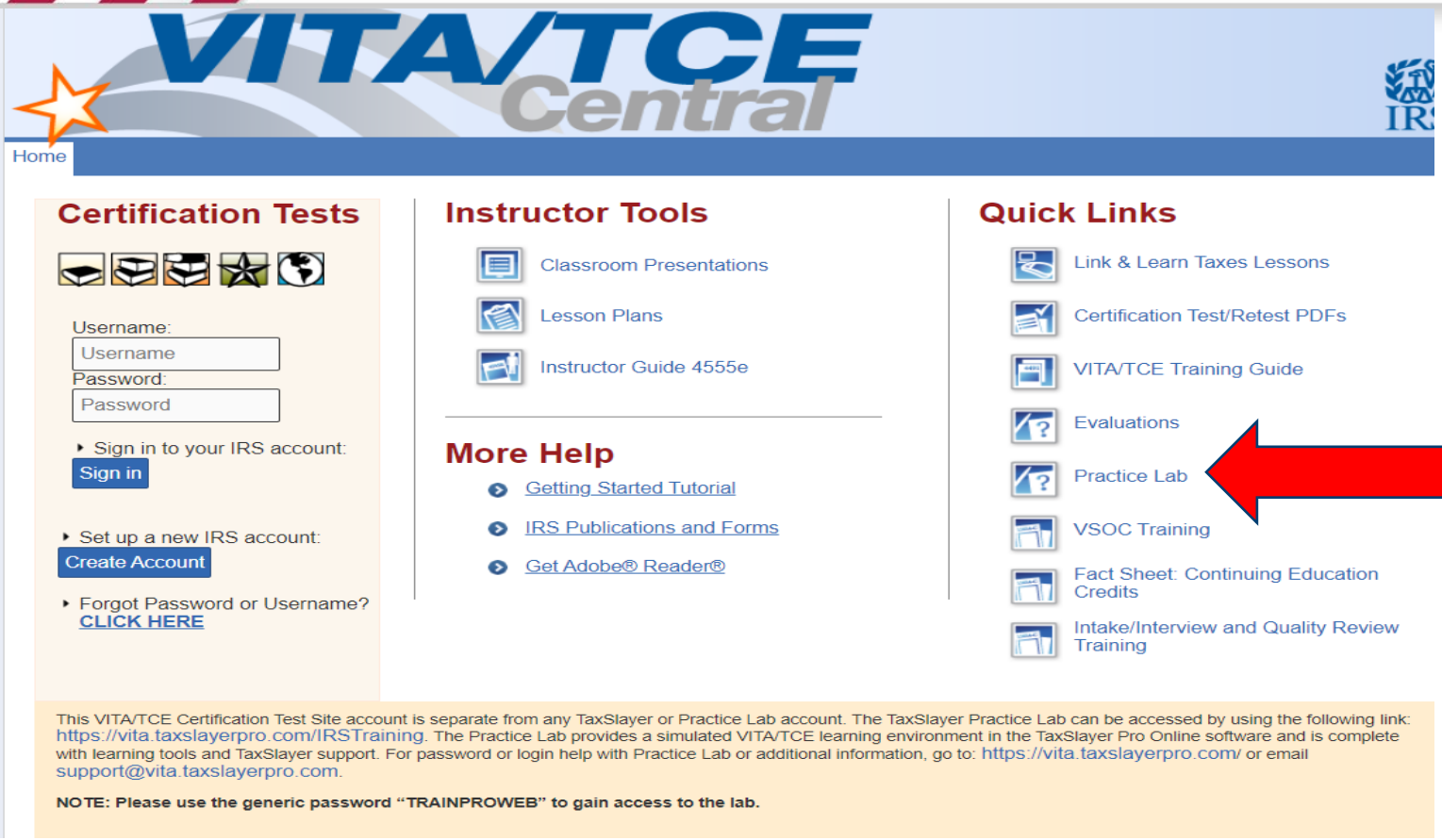
https://apps.irs.gov/app/vita/

VITA/TCE Central
IRS
Home
Certification Tests
Username:
Username
Password:
Password
Sign in to your IRS account:
Sign in
Set up a new IRS ac
Create Account
Forgot Password or Use me?
CLICK HERE
Instructor Tools
Classroom Presentations
Lesson Plans
Instructor Guide 4555e
More Help
Getting Started Tutorial
IRS Publications and Forms
Get Adobe® Reader®
Quick Links
Link & Learn Taxes Lessons
Certification Test/Retest PDFs
VITA/TCE Training Guide
Evaluations
Practice Lab
VSOC Training
Fact Sheet: Continuing Education Credits
Intake/Interview and Quality Review Training

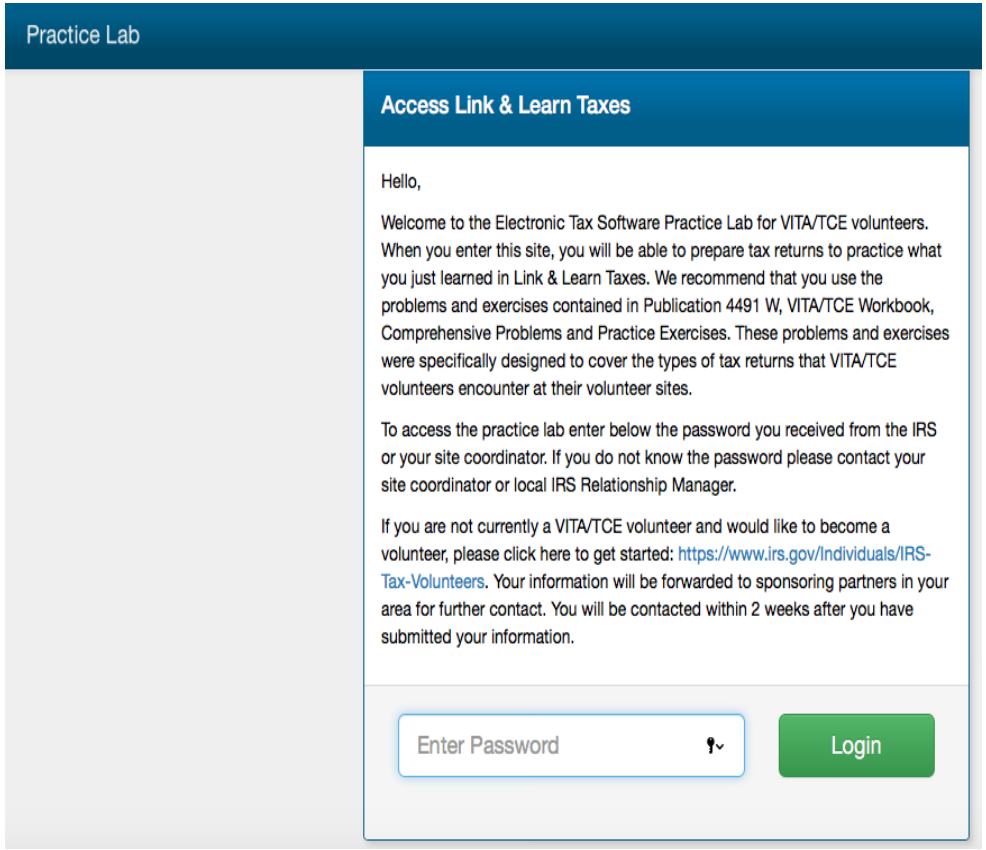
What about software training?

- TaxSlayer recorded webinars
- Practice Problems
- Practice Lab

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


VITA/TCE Central
Home
Certification Tests
Username:
Username
Password:
Password
Sign in to your IRS account:
Sign in
Set up a new IRS account:
Create Account
Forgot Password or Username?
CLICK HERE
Instructor Tools
Classroom Presentations
Lesson Plans
Instructor Guide 4555e
More Help
Getting Started Tutorial
IRS Publications and Forms
Get Adobe® Reader®
Quick Links
Link & Learn Taxes Lessons
Certification Test/Retest PDFs
VITA/TCE Training Guide
Evaluations
Practice Lab
VSOC Training
Fact Sheet: Continuing Education Credits
Intake/Interview and Quality Review Training
This VITA/TCE Certification Test Site account is separate from any TaxSlayer or Practice Lab account. The TaxSlayer Practice Lab can be accessed by using the following link: https://vita.taxslayerpro.com/IRSTraining. The Practice Lab provides a simulated VITA/TCE learning environment in the TaxSlayer Pro Online software and is complete with learning tools and TaxSlayer support. For password or login help with Practice Lab or additional information, go to: https://vita.taxslayerpro.com/ or email support@vita.taxslayerpro.com.
NOTE: Please use the generic password "TRAINPROWEB" to gain access to the lab.

TaxSlayer Practice Lab:
https://vita.taxslayerpro.com/IRSTraining



Password: **TRAINPROWEB**

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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

Thank you.

Email us Questions at:

TS.VITA.TCE.GrowthXXX@irs.gov

This presentation will be available in recorded format for the next 30 days through your existing link.