



Stakeholder Partnerships, Education & Communication

VITA/TCE Volunteer Orientation

Taxpayer Services Division



VITA/TCE Volunteer Orientation

What to expect...





You Can BE the Difference

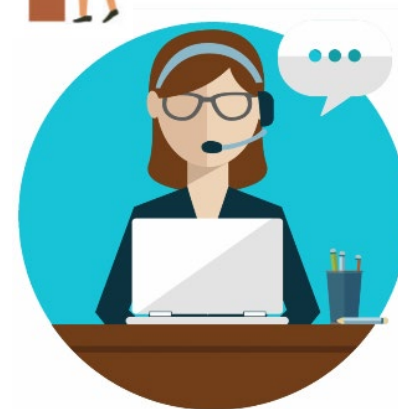
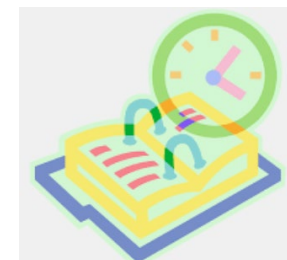
- **Community Impact**
- **Helping Families**
- **Serving for a Cause**





Types of VITA/TCE Services

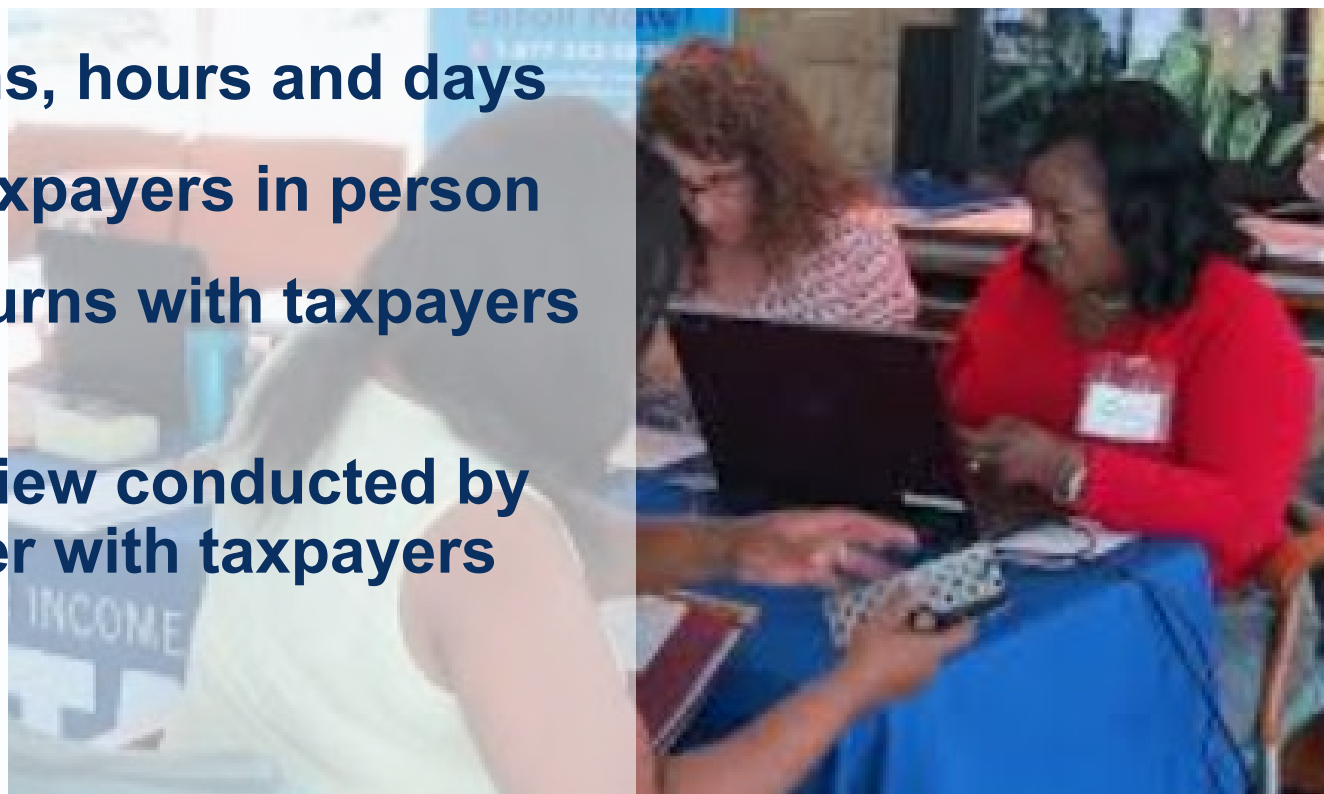
- **Face-to-face (walk-in/appointment)**
- **Virtual**
- **Drop-off and pick-up**
- **Facilitated Self-Assistance (FSA)**





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.



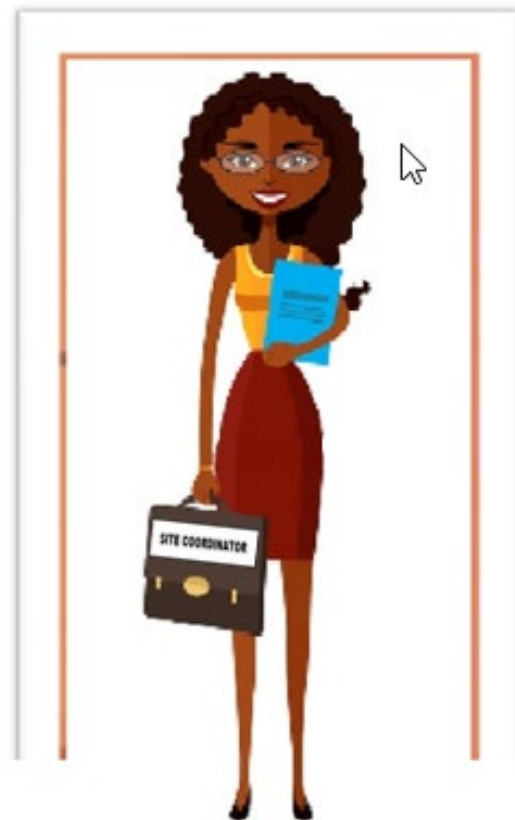
You can choose your volunteer role!

- **Site Coordinator**
- **Greeter/Screenener**
- **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/Screenener



- 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.



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**

Instructor



Tax-law certification to the Advanced or higher level is required for this position.



Volunteer positions that do not require tax law certification:

- **Greeter/Screenener**
- **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/>

Link & Learn Taxes linking volunteers to quality e-learning



Home

Certification
Paths

Puerto Rico

Foreign Student



WELCOME: Link & Learn Taxes e-Learning

→ [Spanish](#)

Link & Learn Taxes is self-paced e-learning for the Volunteer Income Tax Assistance and Tax Counseling for the Elderly (VITA/TCE) program. This training will instruct you in the VITA/TCE return preparation process and tax law covered in the VITA/TCE program.

[Click here to see the content of each course.](#)

Click the Certifications Paths tab above to select your certification level and access the student and teacher course materials.



[Course Evaluation](#)

We welcome your suggestions for improving your experience, as well as



Introducing the new [VITA/TCE Central](#) 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 13614-C, Intake/Interview and Quality Review Training, optional specialty courses, and Site Coordinator training) are also available on [VITA/TCE Central](#).

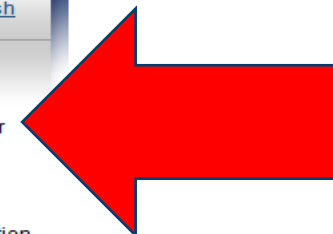
Additional Resources




[Tax Software Practice Lab](#)

→ [Partner and Volunteer Resource Center](#)

→ [Quality and Volunteer Tax Alerts](#)












VITA/TCE Central



Home

Certification Tests



Username:


Password:


▶ Sign in to your IRS account:
[Sign in](#)


▶ Set up a new IRS account:
[Create Account](#)

▶ Forgot Password or Username?
[CLICK HERE](#)


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[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.



Stakeholder Partnerships, Education & Communication

VITA/TCE Central



Home

Certification Tests



Username:

Password:

► Sign in to your IRS account:

[Sign in](#)

► Set up a new IRS account:

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► Forgot Password or Username?

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Instructor Tools



Classroom Presentations



Lesson Plans



Instructor Guide 4555e

More Help

- [Getting Started Tutorial](#)
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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>

Practice Lab


Access Link & Learn Taxes

Hello,

Welcome to the Electronic Tax Software Practice Lab for VITA/TCE volunteers. When you enter this site, you will be able to prepare tax returns to practice what you just learned in Link & Learn Taxes. We recommend that you use the problems and exercises contained in Publication 4491 W, VITA/TCE Workbook, Comprehensive Problems and Practice Exercises. These problems and exercises were specifically designed to cover the types of tax returns that VITA/TCE volunteers encounter at their volunteer sites.

To access the practice lab enter below the password you received from the IRS or your site coordinator. If you do not know the password please contact your site coordinator or local IRS Relationship Manager.

If you are not currently a VITA/TCE volunteer and would like to become a volunteer, please click here to get started: <https://www.irs.gov/Individuals/IRS-Tax-Volunteers>. Your information will be forwarded to sponsoring partners in your area for further contact. You will be contacted within 2 weeks after you have submitted your information.



Login

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



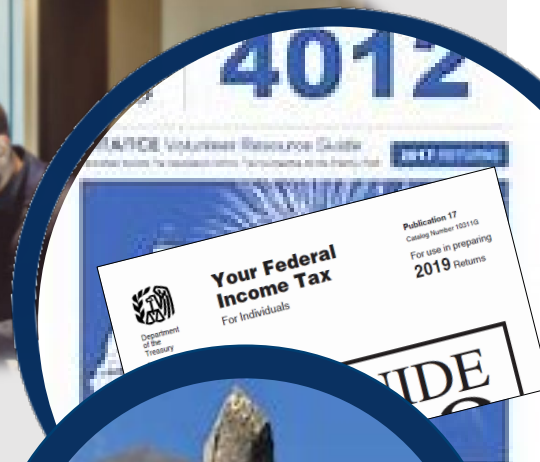


- **What's your favorite learning environment?**
- **How do you see yourself fitting into the VITA/TCE program?**
- **How do you see volunteering with VITA/TCE changing your life?**



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





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.***