

## Frequently Asked Questions: Volunteering with VITA

### **What is the time commitment for volunteering?**

As a volunteer, you can commit to as much or as little time as your schedule allows. Without volunteers, VITA would be unable to operate so any time you can give is much appreciated. With over 14 VITA sites located across Southwest Florida, hours are available during day, evening, and weekend hours. Most VITA sites operate for only three or four hours on scheduled days, so many volunteers commit one or two days a week. Please refer to the list of United Way VITA locations and hours at <https://www.unitedwaylee.org/freetaxprep/>

### **Am I liable for the tax returns I prepare?**

The Volunteer Protection Act of 1997 protects volunteers from liability for negligent acts they perform within the scope of their responsibilities in the organization for which they volunteer. The Act excludes conduct that is willful or criminal, grossly negligent, or reckless, or that constitutes a conscious, vagrant indifference to the rights or safety of the individual potentially harmed by the volunteer. Basically, if volunteers are performing their responsibilities under the Volunteer Standards of Conduct, they are protected.

### **What do I do when arriving at the site?**

All volunteers are asked to arrive at the VITA location 10-15 minutes before their scheduled volunteer time. When arriving, please be sure to sign in with your Site Coordinator. If volunteering at a VITA site for the first time, please remember to bring your signed Volunteer Standards of Conduct (VSoC) Agreement and a photo ID to verify your identity. Each site you volunteer at (if more than one) will need to have a copy of your signed VSoC Agreement.

When taxpayers arrive, a Greeter will distribute the Intake/Interview & Quality Review Sheet and ensure that taxpayers have the required documentation needed to complete the return. Once the taxpayer has been screened by the Greeter, you will go over the Intake/Interview & Quality Review form with the taxpayer then enter the information into the software. When completing the return, your Site Coordinator or a volunteer certified at the appropriate level will conduct a Quality Review of the return. Once the return is completed, the tax return will get printed, reviewed and signed by the taxpayer and will be informed of their responsibility for the information on the return.

### **Do we file federal and state tax returns?**

No, the VITA program files only federal returns.

### **How complicated is the average return?**

The average return you will prepare will be relatively simple. The VITA program has limitations on what volunteers can and cannot prepare. These "out-of-scope" returns are considered to be too complicated and will be referred to a professional tax preparer.

### **How much time does it take to prepare a tax return?**

Taxpayer appointments will be scheduled at 1 hour intervals. Although it probably will not take you an hour to complete a return, this ensures that you have enough time for each return and are not rushed.

## **What if I have a problem with a return?**

Volunteers will only prepare returns that are within the scope of their training. Your Site Coordinator will be certified at the Advanced Level and is able to provide assistance if needed. Please keep in mind that the Volunteer Resource Guide (Publication 4012) and Publication 17 can be used as reference materials. Please do not hesitate to ask your Site Coordinator if you are unsure about the complexity of a tax return or if something seems unusual or questionable regarding the tax return.

## **Although I have completed the required training, I am nervous about making a mistake. What ensures that I prepare each return correctly?**

The VITA program has several ways of ensuring that each return is prepared correctly. Taxpayers will initially be screened by Intake Specialists (or "Greeters") when entering the location. The Intake/Interview & Quality Review process ensures that the information is entered into the TaxSlayer software is correct. The return will then undergo the Quality Review process by your Site Coordinator or a volunteer certified at the appropriate level. Before any return is submitted, it is printed and reviewed with the taxpayer. Basically, three sets of eyes review the return before it is submitted. Also, the TaxSlayer software will not allow any tax return to be submitted if the information provided is incomplete or inconsistent.

## **How do I schedule my volunteer hours?**

After you submit your Volunteer Registration Form, you will be contacted to confirm contact information, availability, training dates, and site preference(s) by VITA Program staff and/or your Site Coordinator.

Please remember that all volunteers must complete the Volunteer Standards of Conduct regardless of their role in the VITA Program. If you are volunteering as a tax preparer, you must complete your certification prior to volunteering at a VITA site.

## **What if I cannot make it to my scheduled volunteer time?**

Please contact your Site Coordinator or VITA Program staff and notify them of your absence as soon as possible so that other arrangements can be made.

## **What do I do in the event of inclement weather?**

Generally, VITA sites will follow the County School District if closed due to inclement weather. However, certain VITA sites may open as scheduled if volunteers and Site Coordinators feel they are able to safely arrive to the VITA Site. All closings and openings are ultimately at the discretion of the VITA Program Coordinator. You will receive an email or phone notification by your Site Coordinator and/or VITA Program staff in the event of inclement weather.

## **Can I have my tax return prepared at a VITA site?**

Absolutely! Anyone earning under \$68,000 is eligible for the VITA service!

## Frequently Asked Questions: VITA Volunteer Certification

### Can I use references to complete the test?

The test is open book and untimed. You can use forms, instructions, and other reference material to take the test. Publication 4012 (Volunteer Resource Guide and Publication 17 will be the best reference material for you to successfully complete your test. You should complete the test on your own. It is a disservice to the taxpayers you assist if you gain assistance from others. There are study sessions available and you can always contact the VITA program staff if you need assistance or guidance.

### What is the passing score for certification?

The passing score for the test for each course is 80%.

### Can I complete the test online?

Yes, the certification is online at [LinkLearnCertification.com](http://LinkLearnCertification.com). This enables you to submit your test electronically as well as save, print and sign your Volunteer Agreement. You are also able to save your test and continue working on it later. It is recommended that volunteers use the scenario information in the Form 6744 Test Book to answer all of the questions and prepare practice returns in the Practice Lab first, then log into the test at [LinkLearnCertification.com](http://LinkLearnCertification.com) and enter your answers.

Please note: All Certification exams must be completed through the Link & Learn Certification website.

### Does the Certification allow me to prepare taxes outside of the VITA program?

No, the VITA Certification is strictly limited to preparing returns for the VITA program. It does not certify you as a preparer for tax returns other than tax returns completed through VITA.

### Do I have to take the Basic Exam before I take the Advanced Exam?

No, the Advanced Certification exam includes scenarios from the Basic Certification exam. You are able to complete just the Advanced Certification if you would like. However, it is recommended to some volunteers to complete the Basic Certification exam before completing the Advanced Certification if they would like extra practice.

### What do I do when I pass my certification exam?

After you have successfully completed your certification exam, you will need to print or save a copy of your Volunteer Standards of Conduct Agreement (aka Volunteer Agreement). Please refer to the VITA Certification website to find out how. You will need to sign (or electronically sign) the Volunteer Agreement and give a copy to your Site Coordinator when you volunteer. Please submit your Volunteer Agreement to VITA program staff as well.

### Can I sign the Volunteer Agreement electronically on Link & Learn website?

Yes. On the right hand of the screen, there is a checkbox to indicate that you would like to electronically sign your Volunteer Agreement.

### **What if I do not pass a test on my first attempt?**

You are allowed a total of 2 attempts at certification for each test. The test questions are randomized from the pool of questions from the regular test and retest. The result is a different test on each attempt. The retest questions are re-worded versions of the regular test questions.

### **What if I do not complete or pass both certification attempts?**

In this event, you can still volunteer with the VITA program. Please contact the VITA Program staff on how you can still be involved with the VITA Program.

### **What if I forget my password for the online test?**

At the bottom of the online test login screen, click the “forgot your password” function to reset your password. Be sure to enter your email address correctly during the registration process so that you can receive e-mail notifications about your login or password.

### **Will I be able to have both the Link & Learn Taxes test and the TaxSlayer Practice Lab open at the same time to go back & forth between screens?**

Users can have both screens open but the online test will time-out if there is a period of inactivity. It is recommended that volunteers use the scenario information in the Form 6744 Test Book to complete the returns in the Practice Lab first, then log into the test on [linklearncertification.com](http://linklearncertification.com) and answer the test questions.

### **Do I have to take the certification exam every year?**

Yes, because tax law changes every year, volunteers must complete the certification test every year that they wish to volunteer with VITA.

### **What tax year does the test use for answers to the questions?**

For the Test Book and the online test the answers will only be based on **2018** tax rates, deductions, and exemptions. There are links to **2018** tax forms, EIC and Tax tables, and Publication 4012, included in the online test. This test will certify volunteers for the 2018 tax year.

### **Why is it important to use the Publication 4012, Volunteer Resource Guide for Tax Year 2018?**

There are test questions that require you to research in Publication 4012, Volunteer Resource Guide for **Tax Year 2018**. The 2018 Publication 4012 is available in your training materials.