

Frequently Asked Questions:

Part I: 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 20 VITA sites located across Southwest Florida, there are opportunities available during weekday, evening, and weekend hours. Most VITA sites operate for only three or four hours on scheduled days, so many volunteers commit to one or two days a week. Please refer to the list of United Way VITA locations and hours at <https://www.unitedwaylee.org/freetaxprep/> (usually updated the end of December for upcoming tax year)

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, and what can I expect?

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 photo ID to verify your identity. Your Site Coordinator will direct you from there.

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, then it's reviewed with and signed by the taxpayer after they have been informed of their responsibility for the information on the return.

Do we file federal and state tax returns?

The VITA program is for federal tax returns; however, some Site Coordinators do offer state return preparation.

How complicated is the average return?

The average return you will prepare will be relatively simple consisting of W2s and Social Security Income. The VITA program has limitations on what volunteers can and cannot prepare. The "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?

Most 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. At each site there are very knowledgeable volunteers, as well as your Site Coordinator who will be certified at the Advanced Level, who are able to provide assistance if needed. Also, please keep in mind that [Publication 4012 \(Volunteer Resource Guide\)](#) 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. It's okay to ask questions.

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

Every return goes through a Quality Review process, ensuring that each return is prepared correctly. The VITA program has several steps in place to help ensure accuracy. First, taxpayers will initially be screened by Intake Specialists (or "Greeters") when entering the location. The Intake/Interview process ensures that the information entered into the TaxSlayer software is complete and 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 every return before it is submitted. In some instances, the TaxSlayer software will not allow tax returns 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 Site Coordinator. Each Site Coordinator is responsible for scheduling the volunteers for their site.

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 also complete tax law 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 of your planned absence as soon as possible so that other arrangements can be made. Remember, appointments get booked in advance so the sooner we know of an absence the sooner we can find replacement coverage.

What do I do in the event of inclement weather?

Generally, VITA sites will follow the County School District's lead 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 Manager. 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 own tax return prepared at a VITA site?

Absolutely! You can complete your own tax return, regardless of income level, and have your Site Coordinator review it and e-file it, as long as it is within the scope of VITA services!

Frequently Asked Questions:

Part II: VITA Volunteer Certification

Can I use references to complete the test?

Yes! 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. We even have study guides and other online tools available at vitaresources.net

What is the passing score for certification?

The passing score for each test is 80%.

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

You are allowed a total of 2 attempts for each test. If you do not pass the first test, you can take the Retest. Both tests can be found in [PUB 6744 Test Book](#)

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 manager on how you can still be involved with the VITA Program.

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

No, however, completing both exams does provide extra practice.

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

Starting in November, the test book and online exam answers will be based on the upcoming tax season's tax rates, deductions, and credits. (October 2022 book is for tax year 2022 tax season in Spring of 2023, October 2023 book will be for tax year 2023, etc.)

Why is it important to use the most current Publication 4012, Volunteer Resource Guide for the upcoming tax year?

There are test questions that require you to research [Publication 4012 \(Volunteer Resource Guide\)](#) **as tax laws do change**. The newest Publication 4012 is available in your training materials and online at <https://www.irs.gov/pub/irs-pdf/p4012.pdf> Updated version is available online mid-October and in print mid-November.

Can I complete the test online?

Yes, **all** certification is done online at [LinkLearnCertification.com](https://linklearncertification.com). This enables you to submit your test electronically as well as save, print and sign your Volunteer Agreement. 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, (write answers in book), then log into the test at [LinkLearnCertification.com](https://linklearncertification.com) and enter your answers.

What do I do when I pass my certification exam?

After you have successfully completed your certification exam, you will need to sign the Volunteer Standards of Conduct Agreement (aka Volunteer Agreement) and send it to the program manager as instructed.

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

Yes. On the right hand of the certification screen, there is a checkbox to indicate that you would like to electronically sign your Volunteer Agreement. Once you do that, save the PDF to your computer, then send it to the Program Manager as an email attachment.

Do I have to take the certification exam every year?

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

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.

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. However, 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 and enter your answers.

There is a study guide that will be available mid-October and other training resources like videos and tips, and Zoom chats, available at vitaresources.net

Please reach out to marym@unitedwaylee.org if you have any questions at all.