

FREQUENTLY ASKED QUESTIONS



Questions you may have beforehand or while volunteering with The Cooperative Ministry's VITA Program

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. The Cooperative Ministry manages 18 VITA sites located across the greater Midlands; hours are available during the day, evening, and weekend. 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 The Cooperative Ministry VITA locations and hours.

I have no experience with taxes, other than my own. Can I still volunteer?

Yes! The Cooperative Ministry, in collaboration with the IRS provides free training. You should plan on about 6-8 hours for training and certification. We offer group training or you can complete training on your own through the IRS' Link and Learn website.

We have three distinct volunteer roles: Site Coordinator, Greeter / Intake Specialist, and Tax Preparer.

All volunteers must complete the Volunteer Standards of Conduct (Ethics) training annually and pass a test.

The Site Coordinator should be Advanced certified. Volunteer tax preparers must pass either the Basic or Advanced certification test.

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, vantage 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 at least 30 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.

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FREQUENTLY ASKED QUESTIONS (CONTINUED)

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, 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?

Yes. Using the provided information, the TaxSlayer software automatically completes the state return. These returns are filed electronically.

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. "Out-of-scope" returns 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") at the tax site. 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.

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FREQUENTLY ASKED QUESTIONS (CONTINUED)

How do I schedule my volunteer hours?

After submitting your Volunteer Registration Form, The Cooperative Ministry VITA Program staff will contact you to confirm information, availability, training dates, and site preference(s).

Please remember that all volunteers must successfully pass the Volunteer Standards of Conduct exam 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 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 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 tax return prepared at a VITA site?

Absolutely! Anyone earning under \$60,000 is eligible for the VITA service!

