Kaimore

VITA TY 2022-2023 Volunteer Training Handbook

Part 1: VITA Introduction

Hello and welcome to Kaimore's VITA program! Did you know 1 in 5 working families in Los Angeles missed out on the Earned Income Tax Credits (EITC) by simply not filing a tax return? The Volunteer Income Tax Assistance (VITA) grant program is an IRS initiative designed to support free tax preparation service for the underserved through various partner organizations. By volunteering, the barriers to claiming tax credits are reduced and millions more can come back to Los Angeles.

Part 2: Volunteer Roles

Volunteering for VITA is a rewarding experience and a wonderful way to give back to your community. Volunteers learn a new skill and meet other people. For each hour a volunteer contributes - $1,800 in refunds are brought back to your community.
With your support, we can help more households with free VITA services.

The following positions are available:
- **Field Intake Managers** - Assist taxpayers complete the Intake and Interview Sheet over-the-phone. *Field* Intake managers will come along to sites in Los Angeles County to help collect intake information. These positions require the

successful passing of both (1) Volunteer Standards of Conduct and (2) Intake/Interview tests.
  - ○ Expect 2-6 hours of studying and completing both tests.
- **Volunteer Tax Preparers**- Prepare simple tax returns on the IRS's TaxSlayer Software.
  - ○ These positions require the successful passing of (1) Volunteer Standards of Conduct, (2) Intake/Interview tests, and (3) Basic, Advanced, or Circular 230 tests.
  - ○ Expect 12-20 hours of studying and completing the tests.
- **Quality Reviewer**- Review Tax Returns, collect signatures, and E-file returns
  - ○ These positions require successful completion of (1) Volunteer Standards of Conduct, (2) Intake/ Interview tests, (3) Advanced or Circular 230 test, and (4) minimum 3 years of VITA experience or a currently practicing CPA.

There are a number of resources to help you pass your tests and prepare you for tax day. All tests are open book and self-paced. Please complete all certification by Feb 15th.

Part 3: Volunteer Training

All volunteers must complete each certification test annually and all volunteers are required to complete the Volunteer Standards of Conduct (Ethics) training. Volunteers who answer tax law questions, prepare tax returns or quality review must also complete the Intake/Interview & Quality Review training and exam.

Official IRS study materials and test can be found here:
- **PUB 4012 (Volunteer Handbook)**
- **PUB 6744 Volunteer Test Book (Official Test Questions)**

For tax preparers, you can choose to become either a Basic or Advanced level tax preparer. It is strongly encouraged that volunteers certify at the advanced level. It is not necessary to complete the Basic exam before taking the Advanced exam.

If you do not receive a passing score the first time, please contact Joyce Lam at joyce@kaimore.org before you proceed to the second try. You can only try twice.

1. Please select the role you are interested in certifying for to access the training materials:
   a. [Appointment Scheduler](#)
   b. [Field Intake Managers/ Remote Intake Managers](#)
   c. [Volunteer Tax Preparers (remote optional)](#)
   d. [Quality Reviewer (remote optional)](#)

Part 4: Volunteer Certification

ARE YOU READY TO CERTIFY?

1. Certification

Create an account at [linklearncertification.com](#).Click on Create an Account (When you create your account: complete ONLY the fields with the red asterisk *)

Enter the following:

- Group- 01 VITA
- Training Source: Link and Learn (elearning)
- If this is your first year as a VITA volunteer-- enter (1) for number of years volunteered. *Returning volunteers, make sure to change the # of years
- Leave SEID field blank
- PTIN (If you have a valid Preparer Tax Identification Number (PTIN) enter it else leave blank)
- Make sure to write down your username and password!!!
- You need to pass each test with a score of 80% or higher. You get (2) two attempts at each test. Remember to pass all the tests required for your volunteer position.

2. Sign Certification

After completing your certification exams you will be able to electronically sign your volunteer agreement by checking the box in your Link & Learn account in the upper

right hand corner. You cannot volunteer without having a Volunteer Agreement Form sent to us.

On the right of the screen that shows your test results, click the box that says "You may sign your agreement electronically by checking this box" ii. Then click on the link that appears just below your name iii. It will generate a PDF that you need to save to your computer. (See image)

The certificate will look like this: (NOT a yellow page!!)
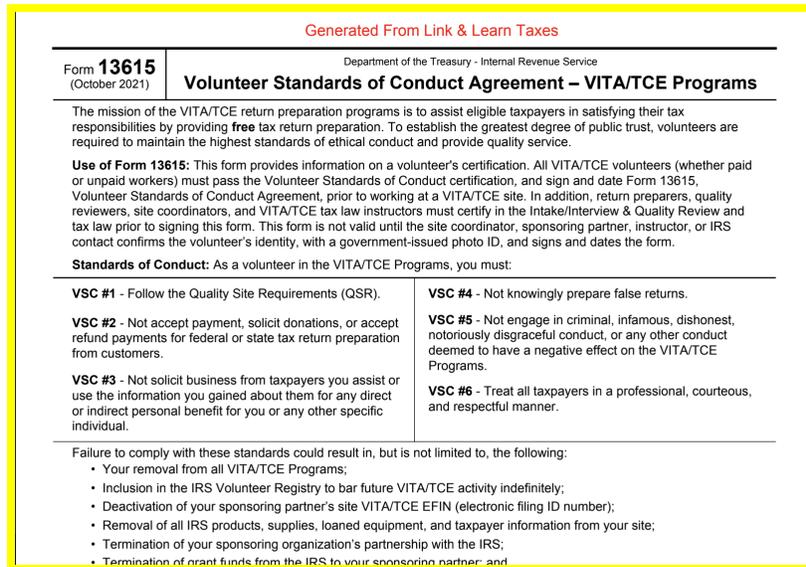
3. Upload Certification

Please email certification HERE, please email Kaimore VITA
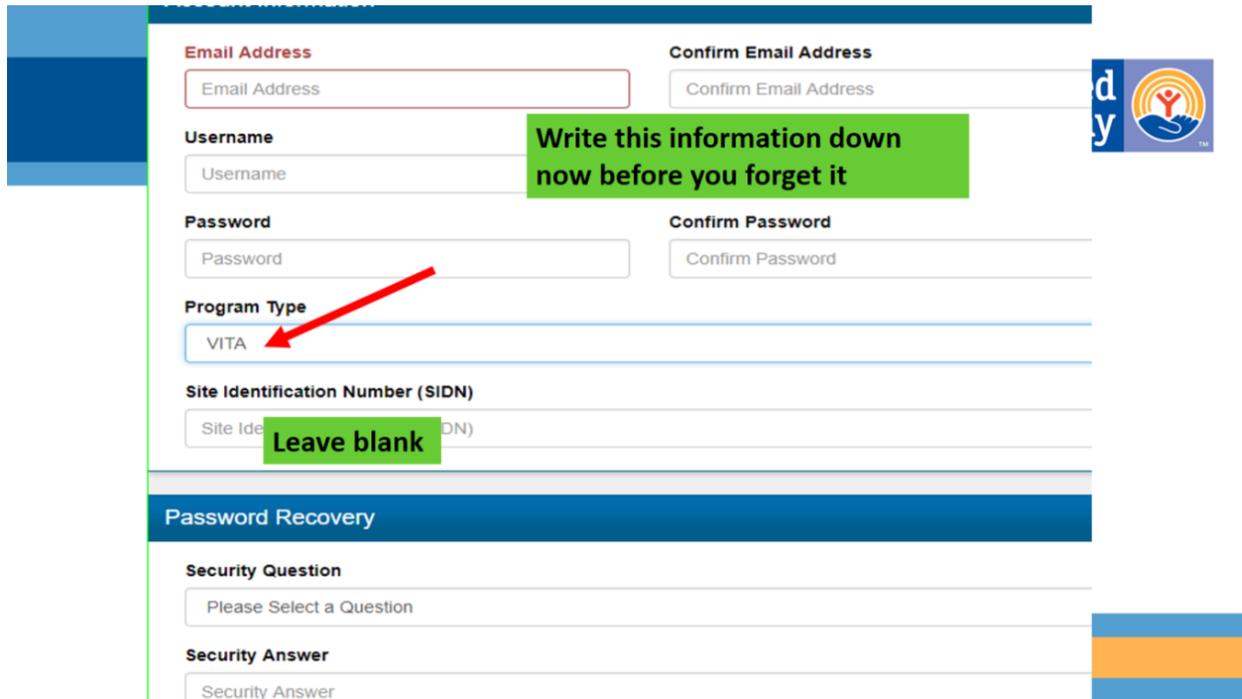(vita@kaimore.org) along with any questions.

Upload Link:
https://docs.google.com/forms/d/e/1FAIpQLScMv8EuLDVNxxhzSNwDr7oF2Q5B
T3WA6aDf_-5gqyCRb3nm4A/viewform?usp=sf_link

Part 5: TaxSlayer Practice

Taxslayer Practice Lab (The Practice Software)

1. **Remember, the more you play with the software,** the better! You will be more familiar with it and more confident.
2. **You cannot mess anything up in the Practice Lab**--it IS NOT LIVE!! You cannot accidentally e-file a return. SO PLAY PLAY PLAY--CHANGE VALUES AND SEE HOW REFUNDS AND CREDITS CHANGE!
3. Practice Lab Website
    1. the password for everyone to access is **TRAINPROWEB** (write this down)
    2. Create an account: (see image)

Tips & Tricks for Taxslayer

- **Use the navigation tree on the left to move around quickly**
- **Use the Search feature, it is really useful!** Not sure where to enter a 1099-R? Type 1099R in the search engine *twala*! it appears! Try typing PIN, 1098t, etc. it's a very useful tool
- **Click on the blue numbers on the summary screen** to and it will take you back to the screen where you entered the data for quick review/editing and then, when you hit continue, it "should" take you back to the Summary page!
- **After you enter information that generates a Schedule, you will see little printer icons appear on the menu**. Click on the printer icon to see what the generated schedule looks like. (Schedule C, Schedule D, Schedule A-itemized deductions, etc.) Great for quick reviews and for catching errors--seeing if your Schedule C is at a loss, etc.