



CCAV

Volunteer Income Tax Assistance



Volunteer Handbook

2017-2018



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Welcome!

Thank You!

The Coalition of Community Assistance Volunteers, Inc. would like to thank you for your interest in becoming a VITA Volunteer!

As a VITA Volunteer, not only are you able to help families access their refunds and save them tax preparation fees, it is a great way to help families increase, encourage and begin to build savings!

Because of our volunteers, CCAV was able to assist more than 2,900 taxpayers (whose average income was \$17,191 per year) with their 2014 returns - and save them approximately \$440,000 in unnecessary tax prep and refund fees! As the Volunteer Income Tax Assistance (VITA) program continues to grow, so does the need for volunteer participation.

In this manual, you will find information about the VITA Program, volunteer positions, the steps to become a VITA Volunteer and the training requirements based on the volunteer position you select.

Once again, thank you for your interest in helping by providing **FREE** tax preparation services to low-income families to make a difference in our community!

We look forward to working with you this Tax Season!



**Coalition of
Community Assistance
Volunteers, Inc.
(CCAV)**

CCAV VITA Program

Volunteer Income Tax Assistance (VITA)

The Volunteer Income Tax Assistance (VITA) Program provides **FREE** income tax return preparation services to help low-income individuals file their return, claim their refunds, and connect them other great services in the community!

This program is sponsored by the IRS, and volunteers are protected under State and Federal Volunteer Protection Acts as long as you are preparing within your certification level.

CCAV VITA Program

The Coalition of Community Assistance Volunteers, Inc. (CCAV) is a 501(c)3 non-profit organization that was created in 2002 to help low income working families throughout the South Plains become more financially self-sufficient.

CCAV offers multiple ways to get involved with the VITA Program, here are the current Volunteer Opportunities:

- Greeter
- Tax Preparer
- Quality Reviewer



Volunteer Opportunities

Greeter

Description:

- No previous experience is required.
- Greeters welcome and provide assistance to taxpayers and volunteer tax preparers at the VITA site. They ensure that the taxpayer has the necessary information to complete their tax return. As a greeter, your responsibilities are to create a pleasant atmosphere, check in the taxpayers that need assistance, give forms that the taxpayers need to complete and make sure they have the correct forms that are needed, and provide general assistance to taxpayers.



Responsibilities:

- Willingness to share time, skills, and interests
- Deal with the public in a helpful and supportive manner
- Pride in performing tasks completely and accurately
- Friendly, dependable and flexible
- Maintain complete confidentiality of taxpayer information.

Tax Preparer

Description:

- No previous experience is required.
- As a Tax Preparer, you will be educated through free tax law training and e-file training, and will have access to materials provided by the IRS to prepare basic individual income tax returns.
- As a volunteer, you'll join a program that's helped millions of people file tax returns at no charge for more than 10 years. Your help will make a difference. It's people helping people. It's that simple.



Responsibilities:

- Deal with the public in a helpful and supportive manner.
- Ensure no compensation of any kind is accepted for the services volunteers provide.
- Prepare only those tax returns for which training and certifications were completed and passed.
- Ensure on-site quality review is performed on completed returns prior to taxpayer signature.

- Maintain complete confidentiality of taxpayer information.

Quality Reviewer

Description:

- Minimum of one year of VITA experience as a Tax Preparer.
- Quality Reviewers render a real-time review for incoming clients that have already completed an online check finished by the Volunteer Tax Preparers.
- Requirement of basic level computer skills to input tax return information.



Responsibilities:

- Establish procedures for the site in coordination with the Site Coordinator
- Clearly establish that all Volunteer Tax Preparers fully know the quality review procedures.
- Efficiently review all tax returns to ensure accuracy prior to providing the returns and/or electronically filing them.
- Give the Tax Preparer feedback regarding mistakes made on tax returns prepared on site.
- Be organized and proficient in communication and customer service.
- Be computer savvy and task oriented, as the Assistant and Site Coordinator will be working closely with the tax preparation software.
- Maintain complete confidentiality of taxpayer information.

Other CCAV VITA Opportunities

Assistant & Site Coordinator

Description:

- Limited - positions are selected by the CCAV Board.
- Previous experience is required.
- Site Coordinators will manage the volunteers at their sites, which will include ensuring adequate coverage during all operating hours, and available to volunteers by phone or email as needed to confirm if they are coming in and/or touch base with them if they don't come in as scheduled.
- They will also ensure that all volunteers working at their sites have passed the necessary certification tests and have verified their identities.
- They will use tools provided by CCAV to track volunteer hours and will also be responsible for providing required reports to the CCAV Program Coordinator. All coordinators will also complete CCAV certification through the advanced level so they can assist where needed with tax preparation and/or quality review.



Responsibilities:

- Ensure that all equipment and supplies are ready before the site opens for operation.
- Confirm that there is sufficient staffing available for the anticipated customers.
- Become familiar with the policies and certifications required by the IRS.
- Be friendly and supportive to the clients and colleagues.
- Maintain complete confidentiality of taxpayer information.
- Be organized and proficient in communication and customer service.
- Be aware of the software used to prepare the returns and any other sources that will be used to complete tax returns.

Please let CCAV know if you would be willing to help with the following tasks at the Tax Site:

- Interpreter - help review tax returns!
- On-Site Technology Assistant

Volunteer Expectations

Tax Site Guidelines

CCAV coordinates with over 100 volunteers in the community, to help us plan and run the site please respect the following guidelines:

- Complete all of the necessary training and certifications prior to your first shift.
- Email CCAV 24 hours in advance if you are going to cancel your shift (please try to coordinate with another volunteer to pick up your shift). We know life happens and you may have to cancel, so please keep us informed!
- Dress appropriately - No gym clothes, shorts, or tank-tops. Jeans are appropriate!
- Complete the shifts you have signed-up for. Please don't leave early unless the Site Coordinator has given you permission to leave (if it's a slow night).
- In the case of bad weather, the Site Coordinator will contact you by email if the site has been closed. Trust your judgement in bad weather conditions!
- Respect the volunteer team.
- Please maintain a positive attitude, even in a complicated situation! If you are experiencing trouble with a Tax Payer, please ask the Site Coordinator or Assistant Site Coordinator for assistance!



2018 Volunteer Shifts

To serve as a CCAV volunteer, you must commit to volunteer a minimum of one two-hour shift per week; however, feel free to select more than one shift! If you're a student, your professor may require that you volunteer for both shifts.

The shift that you select will be your shift throughout the entire Tax Season.

Mondays:

- 4:30 PM - 6:45 PM
- 6:45 PM - 8:45 PM*

Tuesdays:

- 4:30 PM - 6:45 PM
- 6:45 PM - 8:45 PM*

Wednesdays:

- 9:30 AM - 11:30 AM
- 11:30 AM - 1:30 PM
- 1:30 PM - 3:30 PM

Thursdays:

- 4:30 PM - 6:45 PM
- 6:45 PM - 8:45 PM*

Saturdays:

- 8:30 AM - 10:30 AM
- 10:30 AM - 12:30 PM
- 12:30 PM - 2:30 PM*

*Shift may end earlier during the months of March and April.

Volunteer Training

Volunteers are trained by CCAV and the IRS, and enjoy protections under state and federal Volunteer Protection Acts.

VITA Training is mandatory and is to be completed online. You will be responsible for completing the necessary requirements based on the volunteer position you have selected.

Note: Every year you have to re-certify! Also, if you hold any credentials such as a CFP, CPA, or have a PTIN you still need to complete the VITA Certifications. IRS Rules – failure to complete your certifications could jeopardize the CCAV Tax Site! Thank you for your participation and understanding!

Requirements

The following table below lists the certifications you will need to complete prior to your first volunteer shift.

Volunteer Position	Complete 1 st	Complete 2 nd					Complete Last
	VSOC Cert.	IIQR Cert.	Basic Cert.	Advance Cert.	HSA Cert.	COD Cert.	Sign VSOC Agreement Form
	IRS Pub 4961	IRS Pub 5101	IRS Pub 6744	IRS Pub 6744	IRS Pub 4942	IRS Pub 5182	IRS Form 13615
Greeter	X	X	NA	NA	NA	NA	X
Tax Preparer	X	X	X	Optional	NA	NA	X
Quality Reviewer	X	X	NA	X	X	X	X
Assistant Site Coordinator	X	X	NA	X	X	X	X
Site Coordinator	X	X	NA	X	X	X	X

Cert: Certification

IRS Pub: Internal Revenue Service Publication

VSOC: Volunteer Standards of Conduct

IIQR: Intake/Interview and Quality Review

HSA: Health Savings Account

COD: Cancellation of Debt

NA: Not Applicable to the Volunteer Position

X: Required Certifications/Forms to be completed by the Volunteer

Training Information

Below is the following information you will need to review to complete your specific volunteer certification:

Complete	Complete 1 st		Complete 2 nd		Complete Last
	Online Training Resource	IRS Pub Reading Sources	Test/Re-Test Practice Questions Are Located	Location to solve the Tax Return Practice Problems from the Test/Re-Test IRS Pub.	Certification Exams Are Located
VSOC Certification	NA	IRS Pub 4961	IRS Pub 4961	NA	Link and Learn Certification Site
IIQR Certification	NA	IRS Pub 5101	NA	NA	Review and sign the last page of the IRS Pub 5101
Basic Certification	IRS Link and Learn Taxes e-Learning Site	IRS Pub 4491 IRS Pub 4012	IRS Pub 6744	Practice Lab for TaxSlayer	Link and Learn Certification Site
Advance Certification	IRS Link and Learn Taxes e-Learning Site	IRS Pub 4491 IRS Pub 4012	IRS Pub 6744	Practice Lab for TaxSlayer	Link and Learn Certification Site
HSA Certification	IRS Link and Learn Taxes e-Learning Site	IRS Pub 4942 IRS Pub 4012	IRS Pub 4942	Practice Lab for TaxSlayer	Link and Learn Certification Site
COD Certification	IRS Link and Learn Taxes e-Learning Site	IRS Pub 5182 IRS Pub 4012	IRS Pub 5182	Practice Lab for TaxSlayer	Link and Learn Certification Site
VSOC Agreement Form	NA	NA	NA	NA	It will appear after you have completed your exams on the Link and Learn Certification Site (right side of the web page)

TRAINING: IRS Link and Learn Taxes e-Learning Site: <https://apps.irs.gov/app/vita/>
 IRS Publications: Google search. For Example “2018 IRS 4012”

EXAMS: Link and Learn Certification Site: <https://www.linklearncertification.com>
 You create your own account.