

STEP 5-Public Service Frequently Asked Questions

1. Why are we doing this, again?

As a certified VITA volunteer you have the knowledge to help thriving families to go through the ecomplex tax system and file their income tax return. This ensures individuals will have access to federal benefits such as the EIC and CTC. Also, you have come so far and interacting with clients is the fun part!

2. How often can I volunteer?

The minimum volunteer commitment that we ask is 3 hours per week for 6 weeks of the tax season which is the last week of January to April 15. Those volunteers who can help throughout the entire tax season are greatly appreciated. VITA sites have different schedules with some open for 6 weeks and some open for the entire tax season. The heaviest demand for VITA services occurs between the end of January and Spring Break, so any extra hours you can donate during that period is most helpful.

3. What do I do when arriving at the VITA site?

Please arrive at the VITA site at least 10 minutes before your scheduled time. Let the Site Coordinator know you have arrived. Sign in using your site's procedure (sign-in sheet or VITA app or other method) and put on your VITA ID tag which will be provided for you. Your Site Coordinator will direct you from there. New volunteers will observe a few returns before beginning tax preparation.

4. What if I don't know the answer to a question a taxpayer asks?

First, look up the answer to the question in your PUB 4012 VITA Resource Guide. The guide is organized by the order of the tax preparation process and provides helpful tips, charts and steps for most frequently asked questions and situations found at VITA sites. Next, for more complicated tax law questions refer to the PUB 17 Tax Guide 2020 which is published online in January. Your site coordinator can also help you with any questions. All returns will be quality reviewed so make sure you let the designated quality reviewer know of any issues you are not sure about.

5. How do I make sure that the tax return I'm preparing is within the scope of my certification? Volunteers must only prepare tax returns that are within the scope of their certification. Before you start working on a tax return refer to page 2 of Form 13614-C Intake/Interview Quality Review Sheet. Questions are labeled according to the scope of service, (A) for Advanced and (B) for Basic. Make sure that all questions are answered. Unsure responses must be addressed by requesting more information. Next, review the documents the client brings and discuss them with the client. Additionally, review the Scope of Services pages in Pub 4012- Volunteer Resource Guide.

6. What if I make a mistake?

Confirm all answers to tax law questions by referencing the PUB 4012 Resource Guide and the PUB 17 Tax Guide 2020. All tax returns are required to be reviewed by a Designated Quality Reviewer with the client present ensuring that the return has been prepared correctly. Please let the reviewer know about any questions or unusual circumstances before they start the review. Your responsibility as a tax preparer is to communicate with the client and your support personnel (Site Coordinator and Designated Quality Reviewer) to prepare a correct tax return according to tax law documented in PUB 4012 and PUB 17.

5. How do I reschedule my volunteer hours?

Contact your site coordinator. For volunteers working at ITECC, E-mail Taxproject@unitedwayrgv.org to reschedule your hours. Remember that appointments are created based on the number of volunteers available. Therefore, let us know of any changes in advance.

6. What if I cannot make it to my scheduled volunteer time?

Inform your site coordinator immediately. If you're a volunteer at TSC/ITECC and you cannot contact your site coordinator e-mail Taxproject@unitedway.org as soon as possible. Please make an effort to honor your volunteer hours since client appointments are scheduled in advance based on the schedule you have submitted.

7. Can I prepare my own tax return?

Absolutely! You can prepare your own tax return as long as you follow all VITA Quality Site Requirements. The preparer (you or another volunteer) must be certified in scope for the return, the return must be quality reviewed and the proper paperwork on file at the VITA site. The return will be filed according to site procedures. The IRS waives the income limit requirement for VITA volunteers preparing their own return as a thank you for your service.

8. Can I add VITA to my resume?

Yes! VITA is a valuable experience that will improve your resume. Check out the VITA Volunteer Roles link in the Intro Section of this webpage to find a description of each VITA volunteer job.

9. What If I need continuing education credits?

Please read PUB 5362 Continuing Education Credits. You must have a PTIN and certify Advanced to be eligible. When you register for certification testing at LLT VITA Central include your PTIN. Submit the F13615 Volunteer Agreement Form to United Way. You must inform United Way before the end of February that you would like to request CE credits in order for United Way to submit paperwork to the IRS on your behalf. This process is not automatic, so please email taxproject@unitedway.org with your request.

For more information contact taxproject@unitedwayrgv.org