

STEP 4- Training Frequently Asked Questions

1. Why are we doing more training after certification?

Certification is a big hurdle. Once that is done, you can relax a bit and learn how to actually work with a client and prepare a quality tax return. At the UWSCC VITA Tax Preparer Training you will learn how to use TaxSlayer Pro, our tax preparer software.

2. When will the UWSCC VITA Volunteer Tax Preparer Training be held?

Refer to the schedule listed in the Training Materials Section for the schedule. Follow our Facebook VITA page @Vitascc for reminders and more information.

3. Is the UWSCC VITA Volunteer Tax Preparer Training mandatory?

Yes, UWSCC VITA Volunteer Tax Preparer Training is mandatory for all Tax Preparers. Learning how to navigate and prepare a tax return using TaxSlayer will ensure you are ready to work with clients at a VITA site.

4. As a returning volunteer, do I need to attend the UWSCC VITA Volunteer Tax Preparer Training ?

Yes, all Tax Preparers should attend the UWSCC VITA Volunteer Tax Preparer Training. If you have a schedule conflict, please e-mail Taxproject@unitedwayrgv.org. There will be several options for the training.

5. What video conferencing service will be used for the Tax Preparer Training?

Our UWSCC VITA Volunteer Tax Preparer Training will be held via Zoom. For instructions, review the How to Join a Zoom Meeting link under Training Materials.

6. How do I sign up for the required January training (UWSCC VITA Tax Preparer Training)?

RSVP via e-mail to Taxproject@unitedwayrgv.org and read How to Join a Zoom Meeting under references. You will receive a confirmation e-mail that will include an invitation link. Join the Zoom meeting as scheduled following the mentioned instructions. Downloading Zoom is not required.

7. What do I need for the UWSCC VITA Volunteer Tax Preparer Training ?

You'll need your PUB 4012, pen, and paper to take notes as well as your user/password for Practice Lab and a computer. We suggest using a 2-screen setup for the virtual training by logging on to the Zoom call via your smartphone and logging on to Practice Lab on your home laptop. You must be certified before attending training, so please submit your test-site-generated F13615 Volunteer Agreement Form to taxproject@unitedway.org by the training date.

8.I'm a UTRGV Student Volunteer and I'm feeling lost. How can I contact United Way for instructions?

We want you to succeed in your class! Do not hesitate to contact Mayela at taxproject@unitedwayrgv.org or (956) 548-6880 or @vitascc on FB, for VITA Training Information.

For more information contact taxproject@unitedwayrgv.org