

STEP 1- Study Frequently Asked Questions

1. Why Study?

The time we put into studying tax law translates to the high quality of service provided to clients.

2. Which level of tax law do I need to study?

An explanation of the levels of tax law within the VITA program is found in the References section with a link to the IRS's webpage Volunteer Training Certification. United Way recommends that new volunteers certify at Basic level and that returning volunteers and those with previous tax accounting knowledge certify at Advanced level.

3. Which training (curriculum) option would you recommend for me?

United Way recommends that new volunteers certify at Basic level using the VITA-train modules (1-13) to study tax law in conjunction with the e-pub 4491 Training Guide. Returning volunteers and those with previous tax accounting knowledge should certify at Advanced level using e-pub 4491 Training Guide and VITA Central's LLT Taxes Lessons as well as referencing Module 12 of VITA-Train. We do not prepare returns for Puerto Rico or Foreign Students at Camron and Willacy county VITA sites so there is no need to certify at those levels although they are included in the training documents.

4. What is a PUB or Publication?

IRS publications (called PUB for short) are numbered and contain governmental instructions for the Volunteer Income Tax Assistance program. The IRS releases updates to publications for the new tax season yearly in October. Refer to IRS Publications during certification and VITA public service as directed. IRS publications may be found online at irs.gov or by using the pub number as a keyword on an online search engine. A publication that is published as a searchable online document is referred to as an e-pub with the same number as the printed publication.

5. Can I obtain print copies of training materials?

The IRS provides volunteers with a print copy of PUB 4012 VITA Resource Guide and PUB 6744 VITA Test/Retest. These will be available for pick up at the United Way office starting mid-November. Office hours are Mon-Fri 8am - 4pm.

6. Will study sessions be available?

Due to COVID-19 we will not be hosting in-person study groups. However, we will host virtual study groups via Zoom in December. For announcements, please follow our VITA Facebook page @vitascc and check your e-mails from Taxproject@unitedwayrgv.org as well as the schedule listed under Step-2 Practice.

For more information contact taxproject@unitedwayrgv.org.