

## Frequently Asked Questions

### STEP 1- Study

#### 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 pushes all volunteers to certify at the Advance level. Basic certification is used as practice.

#### 3. 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](http://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.

#### 4. 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 to pick up at the United Way office starting mid-November. Office hours are Mon-Fri 8am - 4pm. Please call beforehand to ensure availability.

#### 5. Will study sessions be available?

Training courses are held in the Fall, October to December. Ensure to submit a VITA volunteer application for future announcements.

### STEP 2- Practice

#### 1. Why Practice?

Practice makes perfect! Working with clients is easier after practicing, according to those volunteers that have worked through all the practice problems during certification, and later at January trainings. Additionally, practice will increase your confidence!

#### 2. What is Practice Lab?

The Practice Lab provides a simulated VITA learning environment. You can create practice tax returns and edit as necessary. You will use this tool for both practice and testing scenarios.

#### 3. Is Practice Lab an actual tax preparation software?

No. Practice Lab is not live. You cannot e-file a return.

#### 4. What is the password for Practice Lab?

Practice Lab will request a generic password: TRAINPROWEB before you log in every time. You still need to create your own unique username and password for Practice Lab.

#### 5. Do I need a different login account for Practice Lab and for the VITA/TCE Certification Test Site account?

Yes, the Practice Lab account is separate from the VITA Certification Test Site or live tax preparation account at TaxSlayer. You will end up having 3 unique user accounts during your VITA experience (Practice Lab, Test Site, and TaxSlayer). Each one of these separate accounts must have a different username.

### **7. How do I sign up for study groups?**

Review our VITA Certification Study Group Schedule and RSVP via e-mail to [Taxproject@unitedwayrgv.org](mailto:Taxproject@unitedwayrgv.org). You will receive a confirmation e-mail.

## **STEP 3- Test**

### **1. Why test?**

Certification for all VITA volunteer tax preparers is the IRS' Quality Site Requirement #1 which helps to ensure that clients receive a quality tax return.

### **2. Do I have to take the VITA Basic/ Advanced Certification test every year?**

Yes, because tax law changes every year, volunteers must complete the certification test every year that they wish to volunteer with VITA.

### **3. How many exams am I required to take?**

All VITA volunteers must pass the Volunteer Standards of Conduct certification, and sign and date Form 13615 Volunteer Standards of Conduct Agreement, prior to working with the public at a VITA site. Tax Preparers, Quality Reviewers, and Site Coordinators must pass the Intake/Interview and Quality Review Exam and Basic or Advance Exam.

### **4. Is the online option the only testing option available?**

Yes, all certification exams must be completed through the Link & Learn Certification website.

### **5. Am I allowed to use training materials, such as publications, during the Basic/Advanced Certification test?**

Yes! In fact, there are test questions that require you to research in Publication 4012 Volunteer Resource Guide. Additionally, you can use any other Publications provided.

### **6. Any test-taking tips?**

Always work the test in Publication 6744- Volunteer Assistor's Test/Retest before going to VITA Central's test site to complete the online test, since questions are pulled from both test and retest. This will allow you to answer the examination questions at your own pace, review your answers, and feel more confident! Study what you get wrong by looking in PUB 4012, PUB 17 or PUB 4491. Remember that VITA Central allows a total of 2 attempts at certification for each test.

### **7. What if my internet connection fails while testing?**

United Way suggests to save your answers as you go by clicking on "Save" frequently. This option also allows you to save your test and continue working on it later. Remember to work each test on Publication 6744 VITA Test/Retest prior examination. This will save you time and reduce the likeliness of experiencing internet connection issues.

### **8. Does the VITA Basic/Advanced Certification allow me to prepare taxes outside of the VITA program?**

No, the VITA Certification is strictly limited to preparing returns for the VITA program.

### **9. What is the F13615 Volunteer Agreement Form?**

F13615 Volunteer Agreement Form provides information on a volunteer's certification. For instructions on how to sign and download F13515 refer to Instructions to Sign and Download F13614 Volunteer Agreement Form under Training Materials.

## STEP 4- Training

### 1. Why are we doing more training after certification?

Yes, in fact, we hold a MANDATORY training for a volunteers. In this training, you will role play a client and a tax preparer (two scenarios) to give the experience and simulate what you would encounter at a VITA site.

### 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 preparing 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](mailto:Taxproject@unitedwayrgv.org). There will be several options for the training.

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

RSVP via e-mail to [Taxproject@unitedwayrgv.org](mailto:Taxproject@unitedwayrgv.org). Text messages and emails are sent as reminders.

### 6. 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. You must be certified before attending training, so please submit your test-site-generated F13615 Volunteer Agreement Form to [taxproject@unitedway.org](mailto:taxproject@unitedway.org) by the training date.

### 7. 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 Leslie at [taxproject@unitedwayrgv.org](mailto:taxproject@unitedwayrgv.org) or (956) 548-6880.

## STEP 5-Public Service

### 1. Why are we doing this, again?

As a certified VITA volunteer you have the knowledge to help thriving families to go through the complex 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 6 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 2025 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 2025. 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](mailto: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](mailto:Taxproject@unitedway.org) as soon as possible. Please try 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. Remember that the income limit still applies.

#### **8. Can I add VITA to my resume?**

Yes! VITA is a valuable experience that will improve your resume.

#### **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 for United Way to submit paperwork to the IRS on your behalf. This process is not automatic, so please email [taxproject@unitedway.org](mailto:taxproject@unitedway.org) with your request.