



VITA PROGRAM

Frequently Asked Questions

What if I don't know anything about preparing taxes?

- No worries! Our orientation and trainings will definitely prepare you to provide this important service.

What if I am not confident in my math skills?

- The software we use is super easy to navigate. When you prepare the taxes, the software automatically calculates the math for you.

How do I get the training materials?

- When you attend the orientation, training materials will be distributed at that time. You can also access the training materials online from the IRS website.

When does training start?

- December 2020
 - ✓ Exact date: TBD

What site do I use to get certified?

- www.linklearncertification.com

IMPORTANT!

Returning volunteers: You do *not* need a new login for this tax season. Please use your current login information.

How do I get certified by the IRS?

- Link and Learn (the site listed above) provides all tests and certifications.
- Please be sure to email or print Form 13615 after you have completed the tests and certifications and provide the form to our VITA Coordinator.

What are the levels of certification?

- For certification testing you must first pass the Volunteer Standards of Conduct and the Intake/Interview and Quality Review tests.
- You can then choose either the Basic or the Advanced certification test:
 - ✓ Basic certification covers simple returns such as W2's and Social Security income.
 - ✓ Advanced certification covers everything in the Basic level along with self-employment, capitol gains/losses, 1099's, schedule C's, etc.

Do I need my own laptop/computer?

- We can provide you with a laptop/computer if you are working in person at one of our sites. If you are working from home doing virtual returns, then yes, you will need to have your own laptop/computer to process returns.



What software will we be using to process taxes?

- *Tax Slayer Pro* is the software we have used since 2017. This is the same software used in Link and Learn, where you take the tests to get certified.

What are the minimum hours required to volunteer each week?

- A minimum of four (4) hours per week is required. However, if you'd like to schedule additional shifts, please let our VITA coordinator know you want to help more.

What days are the shifts available?

- Shifts are available from Monday through Saturday
- Times: TBD

How many VITA locations does Interfaith have?

Our North San Diego County service locations are:

- Coastal: Carlsbad, Oceanside, Vista
- Inland: Escondido, Poway, San Marcos

Can I volunteer at more than one site?

- Yes! Be sure to work out your schedule with our VITA Coordinator.

Will we be preparing taxes in person?

- Yes! To ensure a safe environment for all, we have in person options and adhere to safety restrictions (see below for detailed precautionary measures).

What precautionary measures will be in place to ensure we are staying safe?

- Temperatures will be taken for all staff, volunteers, and clients before entering the facility.
- Anyone displaying Covid-19 or flu-like symptoms will refrain from entering the facility.
- Masks/face shields are required to be worn at all times
- Gloves are optional, and we will have them available if you would like to wear them.
- Plexiglass surrounds all work areas to protect tax preparers and clients.
- Clients can be asked to wait in their vehicle while taxes are being prepared in the office.

If I am uncomfortable volunteering in person, are there alternatives?

- Yes! We have virtual VITA which is a contactless option via phone and email interactions with clients. Another option is to work from home and have returns scanned over to an encrypted email that will be provided to you by Interfaith.