



# **New Volunteer Reference Materials**



## Volunteer Tax Preparer Testing and Certification Process

Easy links to resources and testing-related sites:

<http://www.ctcresources.com>

### What You'll Need

- Form 6744 "Volunteer Assistor's Test/Retest" booklet from training (or [electronic version](#) at IRS.gov)
- Publication 4012 (<https://www.irs.gov/pub/irs-pdf/p4012.pdf>)

### What You'll Do

Answer the test and retest questions in the 6744 booklet for each section that you need to pass for your role (Tax Preparers need to pass, at minimum, three tests: Standards of Conduct; Intake/Interview & Quality Review; and Basic). Completing both versions of the test is the best way to retain the information. Remember, you should use the Pub 4012 as a reference. Don't guess at the answers. These represent real questions you'll need to answer at the tax centers.

Some questions will require using the TaxSlayer Practice Lab. Once you're comfortable with your answers, log in to the actual certification website and simply transfer your answers to submit for grading.

What if you don't pass the test on the first try? Don't worry. The website will use the "test" questions on your first try and will tell you immediately which questions you answered incorrectly. The second time you take the test, it will use the "retest" questions. Consider coming to one of our popular group testing support sessions for additional help. Our experience shows the support sessions are very effective in helping volunteers pass the certification.

### Step-by-Step

**STEP 1:** Open the 6744 booklet to the "Volunteer Standards of Conduct" section on page 11. Complete the "Test Questions" as well as the "Retest Questions." Ignore the Form 13615 that comes after this section. This is not the version you will turn in at your tax site! Handwritten forms are not proof of your certification.

**STEP 2:** The next section of the 6744 is "Intake/Interview and Quality Review" starting on page 21. Complete the "Test Questions" and the "Retest Questions."

**STEP 3:** Move on to the Basic Course Scenarios on page 25. You'll be able to answer the first several questions with just your reference materials.

**STEP 4:** When you reach Scenario 7 on page 31, it's time to login to the TaxSlayer Practice Lab. You'll use the software to complete tax returns based on the remaining scenarios.

TaxSlayer Practice Lab link: <https://vita.taxslayerpro.com/IRSTraining>

You'll be prompted first to enter a generic passcode: TRAINPROWEB

Then enter the username and password that you created during the classroom training and wrote down on your "Training Resources and Logins" sheet.

Notes for the Practice Lab:

- You are not being tested on this practice site.
- The software will save your practice returns even after you log out.
- When entering Social Security numbers (SSNs) or Employer Identification Numbers (EINs), replace the Xs with any digits of your choice, but write them down in your booklet so you can find those practice returns again.

**STEP 5:** You're nearly done! Time to enter your responses into the official test website.

Link and Learn testing site: [www.linklearncertification.com](http://www.linklearncertification.com)

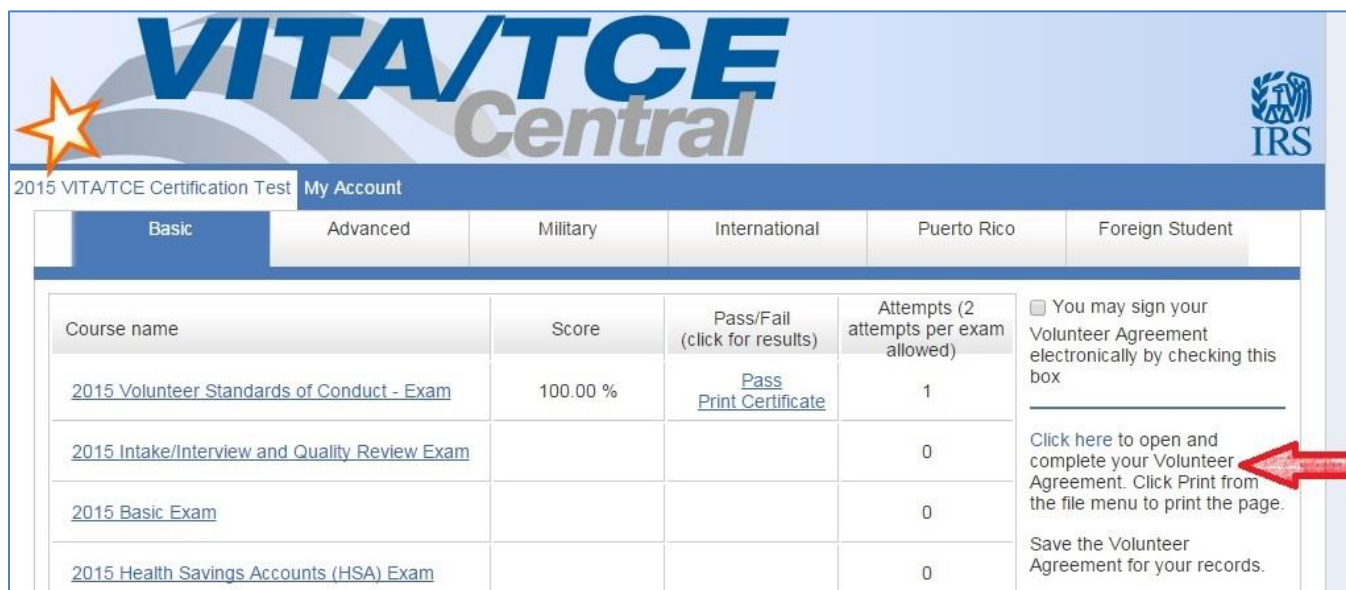
Click on "Create Account." Yes, you'll need to create *another* login. Note your username and password on your "Training Resources and Logins" sheet from training. *Our staff cannot access your login and password.*

Start with the Volunteer Standards of Conduct Test and transfer the answers from your book into the computer-based test.


Notes for the testing site:

- **The test is NOT timed.**
- You can log in and log out as you wish.
- Once you've entered your answers for a particular section, you will be given a chance to review. Take the review seriously. Make sure you haven't made any errors transferring your answers from your book.
- Your score will pop up immediately when you make the final submission.
- A passing score is 80%, and you have two chances to pass. (Contact the Volunteer Coordinator for assistance if you don't pass in two tries.)

**STEP 6:** Once you've passed, print the "volunteer agreement" as proof. On the home page of the site, select "Click here to print volunteer agreement" at the top right. Click the box for electronic signature or print and sign it by hand. **Print extra copies. You need to take a copy to each site where you volunteer.**



The screenshot shows the VITA/TCE Central website interface. At the top, there is a navigation bar with "2015 VITA/TCE Certification Test" and "My Account". Below this is a table with tabs for "Basic", "Advanced", "Military", "International", "Puerto Rico", and "Foreign Student". The "Basic" tab is selected. The table contains the following data:

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	
<a href="#">2015 Volunteer Standards of Conduct - Exam</a>	100.00 %	Pass <a href="#">Print Certificate</a>	1	<input type="checkbox"/> You may sign your Volunteer Agreement electronically by checking this box
<a href="#">2015 Intake/Interview and Quality Review Exam</a>			0	Click here to open and complete your Volunteer Agreement. Click Print from the file menu to print the page. 
<a href="#">2015 Basic Exam</a>			0	
<a href="#">2015 Health Savings Accounts (HSA) Exam</a>			0	

Below the table, there is a section for "Save the Volunteer Agreement for your records." with a link to "Click here to open and complete your Volunteer Agreement. Click Print from the file menu to print the page." A red arrow points to this link.

**Send a copy to the Volunteer Coordinator at:**

Email: [gwen.moore@foundcom.org](mailto:gwen.moore@foundcom.org)

Fax: 512-916-4420 (please notify the Coordinator if you are sending a fax)

Mail: Foundation Communities, 2600 W Stassney, Austin, TX 78745

***Gwen must have your signed volunteer agreement before you begin volunteering!***

Problems? Need a pep talk? Contact Gwen at [gwen.moore@foundcom.org](mailto:gwen.moore@foundcom.org) or 512-610-7967.



## Instructions for Using Online Volunteer Account

[www.MyVolunteerPage.com](http://www.MyVolunteerPage.com)

**QUICK GUIDE:** **Opportunities** tab – sign up for shifts; **Schedule** tab – see what you’ve already signed up for; **Hours** tab – enter your service hours

### STEP-BY-STEP GUIDE:

#### Scheduling your Shifts

- Select the "Opportunities" tab.
- Select the location and the volunteer role in which you would like to work.

**\*Do not sign up for more than one role during a shift.\***

**There are 3 volunteer roles listed:**

- **Tax Preparer** - Tax Preparer volunteers prepare tax returns for clients. All Tax Preparers must pass, at minimum, the IRS certification test for the Basic Tax Preparation and submit the Volunteer Agreement to Gwen Moore before preparing taxes.
  - **Client Liaison** - Client Liaison volunteers welcome clients, screen for eligibility and preparedness, collect documents, and assemble the information necessary for the Tax Preparer to complete the tax return in an efficient manner. All Client Liaisons must pass, at minimum, the IRS certification test for Standards of Conduct and Intake Interview/Quality Review and submit the Volunteer Agreement to Gwen Moore before volunteering.
  - **Translator** - Translators provide Spanish/English translation for clients who need it. All Translators must pass, at minimum, the IRS certification test for Standards of Conduct and submit the Volunteer Agreement to Gwen Moore before volunteering. Translators are scheduled only for our busiest sites and shifts.
- Select the “sign up” button next to the time slot you would like.
  - To remove yourself from a shift, go to the “schedule” tab and click “remove” next to your chosen shift. Be sure to click “remove” again in the window that pops up.

#### **Important notes:**

- Once you have clicked “sign up,” you are on the volunteer schedule.
- When the shift is less than 48 hours away, you cannot cancel using the online system. If you must cancel, contact Gwen Moore so that she can try to fill your spot on the schedule.
- Our staff uses the schedule to make on-site decisions. You can help us by signing up at least 2 days in advance, but you can sign up on the day of the shift if necessary.
- Shifts are on a first-come, first-served basis.
- If you have special circumstances that require different times than listed, please contact Gwen Moore. We will attempt to make special arrangements for your schedule, when possible.
- The “schedule” tab will show all the shifts you have signed up for. Remember, these are times that our staff expect you to be on-site.

#### Logging your Volunteer Hours (optional)

- Click on the “hours” tab and select “Community Tax Centers” as your organization.
- For “activity,” be sure to choose the correct location and volunteer role.
- Enter the date you volunteered and the number of hours and minutes. You can be as exact as you want, but we will round to the nearest quarter hour for our reports.
- Click “save,” and you're done! Your new hours should appear under “most recent entries.”
- The “status” will show approved after your hours have been manually verified on the daily sign-in sheets. The may take several weeks during tax season.

**Questions? Contact Gwen Moore, [gwen.moore@foundcom.org](mailto:gwen.moore@foundcom.org), 512-610-7967**



## Volunteer Tax Preparer

Community Tax Centers provide free income tax preparation services to Austin's low-income families. By helping people claim all of the tax credits for which they are eligible, volunteers can give their neighbors a chance to build a financial future. In 2019, the Community Tax Centers will prepare **20,000 tax returns** and bring over **\$35 million** into the pockets of those who need it most in our community. To do this, we need more than **600 volunteers!**

### Volunteer Tax Preparer Responsibilities:

- Complete required training and IRS Volunteer Tax Preparer certification test (support sessions available)
- Manage volunteer schedule using online scheduling tool
- Work directly with families who need help preparing tax returns
- Prepare tax returns by entering data into TaxSlayer software
- Explain the tax return to the client and answer questions
- Protect client privacy and confidentiality
- Provide excellent customer service

### Volunteer Training:

All new volunteers, regardless of prior experience, attend 8 hours of in-person Basic Tax Preparation training, with classes starting in December. Training will cover the basics of tax law, scope restrictions, and TaxSlayer software we use at the Community Tax Centers. At the end of training, you will be familiar with a basic tax return, know how to determine filing status and appropriate deductions/credits, and know how to enter all relevant information into the tax software to create a tax return.

### Volunteers Should Be Comfortable:

- Using Windows-based software
- Working with a team and with people from all walks of life
- Volunteering in a fast-paced environment

### Volunteer Benefits:

- Free training on tax law and tax return preparation
- Convenient tax center locations that offer daytime, evening, and weekend shifts
- Flexibility to set own schedule and choose volunteer site(s)
- Hands-on experience
- Recognition events, awards, and additional perks at increasing service levels
- CPE credit for CPAs, EAs, and other tax professionals (contact coordinator for requirements)

### Volunteer Commitment:

We ask volunteers to serve an average of 3 hours per week during the tax season, January 21 to April 15, 2019. Volunteers who serve a minimum of 10 hours will be asked to continue serving in the off-season through our smaller year-round program but have no obligation to do so.

**For more information or to sign up**, please visit our website at [www.communitytaxcenters.org](http://www.communitytaxcenters.org) or contact:

Gwen Moore, Community Tax Centers Volunteer Coordinator

[Gwen.Moore@foundcom.org](mailto:Gwen.Moore@foundcom.org), 512-610-7967

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## Volunteer Philosophy

**Foundation Communities** is a local, homegrown nonprofit. Founded in 1990, we provide affordable, attractive homes and free onsite support services for thousands of families, veterans, seniors, and individuals with disabilities. We offer an innovative, proven model that empowers our residents and neighbors to achieve educational success, financial stability, and healthier lifestyles. We own and operate 23 communities in Austin and North Texas.

### **Volunteer Philosophy Statement:**

We believe that our volunteers and staff members are the greatest resource to Foundation Communities programs. Volunteers and staff will work side-by-side to deliver our mission of empowering low-and-moderate income families and individuals with the tools they need in their pursuit of personal and economic success. Although responsibilities may differ, we believe that volunteers and staff members should both lead and serve. Volunteers are vital and essential to programming needs of Foundation Communities.

### **Volunteer Bill of Rights:**

- Volunteers will be treated with the utmost professionalism, courtesy and will not be seen as “free” help.
- Volunteers have the right to be heard. We are committed to providing effective channels of communication for feedback and effective and efficient conflict resolution.
- Volunteers will be given the opportunity to provide feedback on their experiences helping us to provide a better experience for volunteers, clients and staff.
- Volunteers have the right to receive the appropriate training necessary to fulfill their roles and responsibilities.
- Volunteers have the right to work in a safe and friendly environment. You have a right not to tolerate working in an environment of disrespect, harassment or abuse of any form.
- Volunteers have a right to work in an environment that supports and encourages diversity.
- Volunteers have the right to work in an environment that supports personal and professional development.
- Volunteers have the right to be and will be recognized and acknowledged for their commitment and talent.

### **Volunteer Standard of Conduct:**

- Volunteers will treat clients and residents professionally, courteously and respectfully.
- Volunteers will safeguard confidentiality of clients and residents in all matters.
- Volunteers will provide service to the best of their ability and act in the best interest of the client and residents.
- Volunteers will only provide services they are qualified and trained to give.
- Volunteers will exercise reasonable care for Foundation Communities equipment and space.
- Volunteers will not solicit business from clients and residents or use knowledge gained from Foundation Communities training for personal gain. As well, volunteers should not act as a representative of a company, organization or from the field they work during time spent volunteering with Foundation Communities.
- Volunteers will not accept payment for services provided.
- Volunteers will follow the policies and procedures designated by the Foundation Communities.
- Volunteers will sign policy and agreement forms prior to providing client services.

## **“It’s My First Day” Checklist**

On your first day, you’ll need:

- your printed Form 13615
- photo I.D.
- volunteer name badge (mailed to your home address)
- this checklist

When you arrive on-site, the first steps are to find the volunteer sign-in binder and the Site Manager to introduce yourself. They will go through this checklist with you or ask an experienced volunteer to help you.

### **All volunteers:**

- I signed in on the Volunteer Sign-in sheet.
- I checked in with the Site Manager.
- I identified the Volunteer Leadership Team member on duty.
- I turned in my signed volunteer agreement. (All volunteers must pass the Standards of Conduct test. Tax preparers must additionally pass the Intake/Interview/Quality Review and Basic test, at minimum.)
- I received a lanyard and plastic badge holder for my name badge.
- I located: restroom for clients; restroom for volunteers/staff; snacks and water; the emergency exit.
- I know what to do if I need a Spanish Translator.
- I know where to go if I need help or have questions.

### **Tax Preparer:**

- I was asked to shadow before completing returns on my own.
- I know where to find the customer envelope queue.
- I located the printer and extra paper.
- I know how to log in on the computers and TaxSlayer.
- I checked [www.ctcresources.com](http://www.ctcresources.com) for tax alerts.
- I know what to do if I get a tax return that I am not qualified to prepare.
- I know what to do when I am ready for a Quality Review.
- I know where to find printed resource materials, worksheets, and forms at the site.

### **Client Liaison:**

- I was asked to shadow before my completing the intake process on my own.
- I located: the client sign-in sheet; extra clip boards; extra intake forms.
- I confirmed whether or not appointments are offered at this location.
- I know what to do if a client wants to use our drop-off services.
- I know what to do if a client is deaf or has other special needs.
- I know where to place the client envelopes in queue.
- I know what do if I am unsure that a client is qualified for our services.
- I know what do if a client is missing identification or documents.

### **Translator:**

- I know where to find the site copy of the IRS Publication 850 (English-Spanish Glossary).
- I have spoken with the Site Manager to coordinate where I will be and what tasks I can work on if translating services are not needed during part of my shift.