

VITA Training Overview

All volunteer tax preparers must be certified at the basic level. Although only a basic certification is required, volunteers are encouraged to attempt certification at the Intermediate and Advanced levels. Volunteers must pass the Basic Exam with 80% (answer 24 of 30 questions correctly.) Two attempts to complete the exam are allowed. All exams are untimed and open book.

After completing certification, all volunteers are required to complete and submit the **VITA Volunteer Agreement/Standard Conduct (Form 13615) to Branden Stephenson, VITA Program Administrator, by January 17, 2011.**

Returning Volunteers

2011 IRS training materials have arrived. Please stop by the United Way of Greenville County between the hours of 9:00am-5:00pm Monday through Friday to collect your materials. The United Way of Greenville County is located at 105 Edinburgh Court, Greenville, SC 29607.

New Volunteer Orientations

New volunteer orientations will provide an overview of the VITA Program, site operations, roles and responsibilities, and an overview of the IRS training materials and IRS Link and Learn training website.

Training Options (Choose One Training Option)

Independent Study

Volunteer tax preparers have the option of completing tax training independently through the IRS Link and Learn website. Link and Learn is a web based program that provides the required training and certification courses. This interactive course teaches you the basics to accurately prepare tax returns. The Link and Learn program allows you to complete the certification at your own convenience and pace. This training option is recommended for returning volunteers and those with tax preparation experience. For additional support, volunteers can attend one of our tax preparer study sessions.

Classroom Instruction

Classroom trainings will provide additional training and assistance to volunteers working towards their certifications. Volunteers should familiarize themselves with the IRS training materials prior to attend and come to the class prepared to gain hands on experience preparing taxes. Classroom trainings will be held at the Buck Mickel Center located at 506 South Pleasantburg Drive, Greenville, SC 29607-2418.

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Additional Supports (Optional)

Study Sessions

Study sessions will provide volunteers with additional practice learning the material and TaxWise Software. These sessions will give volunteers an opportunity to ask specific tax questions. These sessions will be optional and somewhat informal. Study Sessions should only be about 2 hours. Study Sessions will be held at the United Way of Greenville located at 105 Edinburgh Court, Greenville, SC 29607.

Exam Days

Exam Days will be an opportunity for volunteers to take the exam together on a testing day in a computer lab. Trainers will be available to help volunteers with any technical questions or concerns. Exam Days are optional. Exam days will be held at the United Way of Greenville located at 105 Edinburgh Court, Greenville, SC 29607.

Extra Help

Extra Help will be an opportunity for volunteers to receive additional training if unable to complete IRS certification on the first attempt. This training will provide tutoring to volunteers in specific areas where they need improvement. Extra Help sessions will be held at the United Way of Greenville located at 105 Edinburgh Court, Greenville, SC 29607.

Ongoing Support

New volunteers will work with an experienced peer mentor during their first week of volunteering. This mentor will serve as a resource to the volunteer throughout the tax season.

Volunteers will receive regular trainings from site coordinators regarding tax law changes and site improvement procedures throughout the tax season.