How to Become a VITA Tax Preparer or Greeter

**Step 1: Let us Know You’re Interested**

In the fall, fill out the form at on the bottom of the page [uweci.org/VITA](https://www.uweci.org/get-involved/company/workplace-volunteering/volunteer-income-tax-assistance/). This adds you to our contact list so you can get all the informational emails about trainings and other updates.

**Step 2: RSVP for Training**

Training to become a tax preparer takes place in early to mid-December. The links to RSVP for training will come to you in an email once you have registered using the online form on the [webpage](https://www.uweci.org/get-involved/company/workplace-volunteering/volunteer-income-tax-assistance/). As a tax preparer there are three tests you need to pass. As a greeter, there is one test to pass. The training gets you ready to pass these test(s).

**Step 3: Get Trained**

The IRS requires all VITA volunteers pass certain tests. The material to pass these tests is what is covered in the training. There are separate trainings for new volunteers and returning volunteers. The new volunteer training moves at a slower pace to ensure you have all the information you need before your first season.

**Step 4: Submit Your Volunteer Agreement**

Submitting your volunteer agreement to the VITA manager proves you have passed the test(s). The required tests to be a VITA Tax Preparer are Volunteer Standards of Conduct, Intake/Interview and Quality Review, and Advanced Certification. The required test for a greeter is the Volunteer Standards of Conduct. This form showing you have passed the tests is due to the VITA Manager in early to mid-January. Instructions on how to get this form are included in the informational emails.

**Step 5: Complete Your Background Check**

If you are a new volunteer, you are required to complete a background check. We work with sensitive client information and want to make sure we are protecting that information to the best of our ability. The VITA Manager will reach out with instructions on how to complete your background check.

**Step 6: Sign up For Volunteer Shifts**

Information is sent out in mid-December to early January about selecting your volunteer shift(s). The earlier you sign up, the faster we can get the schedule out to clients to start scheduling their appointments.

**Step 7: Attend Optional Scenario Training**

In January we provide optional scenario trainings on Saturdays. These trainings give you a chance to prepare tax returns like you would at a site and then discuss with the group on any variations or questions. Information about these trainings and links to RSVP for these trainings will be sent out via email. This only applies to tax preparers. Greeters have their overview training in early January.

**Step 8: Volunteer!**

You made it through all the steps and now you are ready to be a VITA volunteer. Thank you for your commitment to this program. We could not help as many people get their taxes done without you! Information about your first shift will be sent out close to the start of the season via email.

FAQs

**Do I need to have an accounting or finance background to volunteer with VITA?**

No! Since we train all volunteers ourselves, being an accountant (or other banking-relating job) isn’t necessary.

**What is the difference between new volunteer trainings and returning volunteer trainings?**

New volunteer trainings for December are broken down into three three-hour sessions. Each session covers different material. We offer two options for each session, either in-person or virtual training. You will want to RSVP for three sessions.

Returning volunteer training is broken down into two three-hour sessions and is only offered virtually. We cover the material more quickly and there is less in-depth discussion.

**What is the timeline for VITA?**

September – December Let us know you’re interested in volunteering by registering and using the volunteer interest form

Early to Mid-December IRS Certification Training

Early January IRS Volunteer Agreement Due; sign up for volunteer shifts

January Sign up for volunteer shifts; Scenario Training (second, third, and fourth Saturdays)

Late January VITA Season begins

Early April VITA Season ends

Late April VITA volunteer celebration dinner

**When is the VITA Tax Season?**

Certification for tax preparation training happens in early to mid-December. Optional scenario training is on several Saturdays in January. The VITA season is 10 weeks and runs from end of January through early April. For the spring of 2024, the VITA season is January 29 through April 5.

**What if I want to be a greeter?**

You need to let us know you’re interested by using the form on the website. You will have a training in early January, pass your certification, complete your background check, and pick your shift.

**How do I find out more about VITA?**

Go to (link volunteer page here) and register as interested in VITA. You will be added to our contact list and receive updates on training, RSVP information for training, and the virtual links for trainings as well as regular updates and information throughout the fall.

**What trainings do I need to attend if I am a new volunteer?**

You will want to attend New Volunteer Session 1, New Volunteer Session 2, and New Volunteer Session 3. Each of these is offered either in-person or virtually. The virtual sessions are recorded and will be available for your review if you are unable to attend one of the trainings live.

**What trainings do I need to attend if I am a returning volunteer?**

You will want to attend Returning Volunteer Session 1 and Returning Volunteer Session 2. Both are virtual and will be recorded for your review if you are unable to attend live.

**What are the kinds of volunteering roles available with VITA?**

For tax preparers we offer three kinds of volunteering roles.

In-person volunteering – this is traditional tax preparation where the client comes in and gets their taxes prepared by you during the appointment. The taxes are then reviewed and filed by another volunteer.

Intake volunteering – the client comes in, you review their intake form, and make sure all documentation is there. The client comes back two weeks later to pick up their return. No tax preparation is done during this kind of volunteering.

Preparation volunteering – you go to one of the preparation sites and work on taxes taken in at one of the other sites. There is a group of volunteers and someone else will review the taxes being prepared. The taxes then go back to the site to be returned within two weeks. There is no face to face client interaction during this kind of volunteering.

**What if I cannot attend the trainings?**

Any virtual training is recorded and a link to access those trainings is provided in our regular email communication. If you are unable to attend the live trainings, the recorded trainings will provide all the information needed to prepare for and pass the tests.

**How many hours do I need to volunteer?**

There is no requirement to work a certain number of hours. Some volunteers work a lot of shifts, and some volunteers work one shift per week. Most shifts are 3 to 4 hours. All help is appreciated, and we will work with you to find a time that works in your schedule.

**What days of the week and times of day are available to volunteer?**

It varies by site which days of the week and times of day are available. In Linn County we have sites in Hiawatha, Marion, and Cedar Rapids with shifts in the morning, afternoon, evening, and weekends. Our schedule for appointments is based on when volunteers are available. We will work with you to find a time that works in your schedule.

In our rural counties, volunteer hours are more limited. However, our schedule for appointments is based on when volunteers are available. We will work with you to find a time that works in your schedule.

**How do clients get an appointment?**

They can either call the number or schedule themselves online. Appointments become available in mid to late January. We do not have any walk-in sites.

**What does it look like to work at a site?**

Each site has a greeter, tax preparers or intake specialists, and a site coordinator. The greeter checks people in and gets clients started on paperwork and then to the preparer to start their taxes. Then the preparer completes the taxes. Next the taxes are reviewed by either the Site Coordinator or the Quality Reviewer. The taxes are then filed.

If it is an intake site, then the client checks in with the greeter and sits down with the intake specialist. They then make sure they have all the necessary documentation. At the end of the shift the taxes taken in go to a preparation site. Clients will also be coming in to pick up their taxes. They are then reviewed with the client, the client signs for them, and the Site Coordinator files them after they are picked up.