



# We Provide VITA Training!

No tax preparation experience necessary. You must be comfortable using a computer, detail-oriented, and have a passion for helping our community.

Orange County United Way and the IRS offer free in-person VITA training for new and returning volunteers.

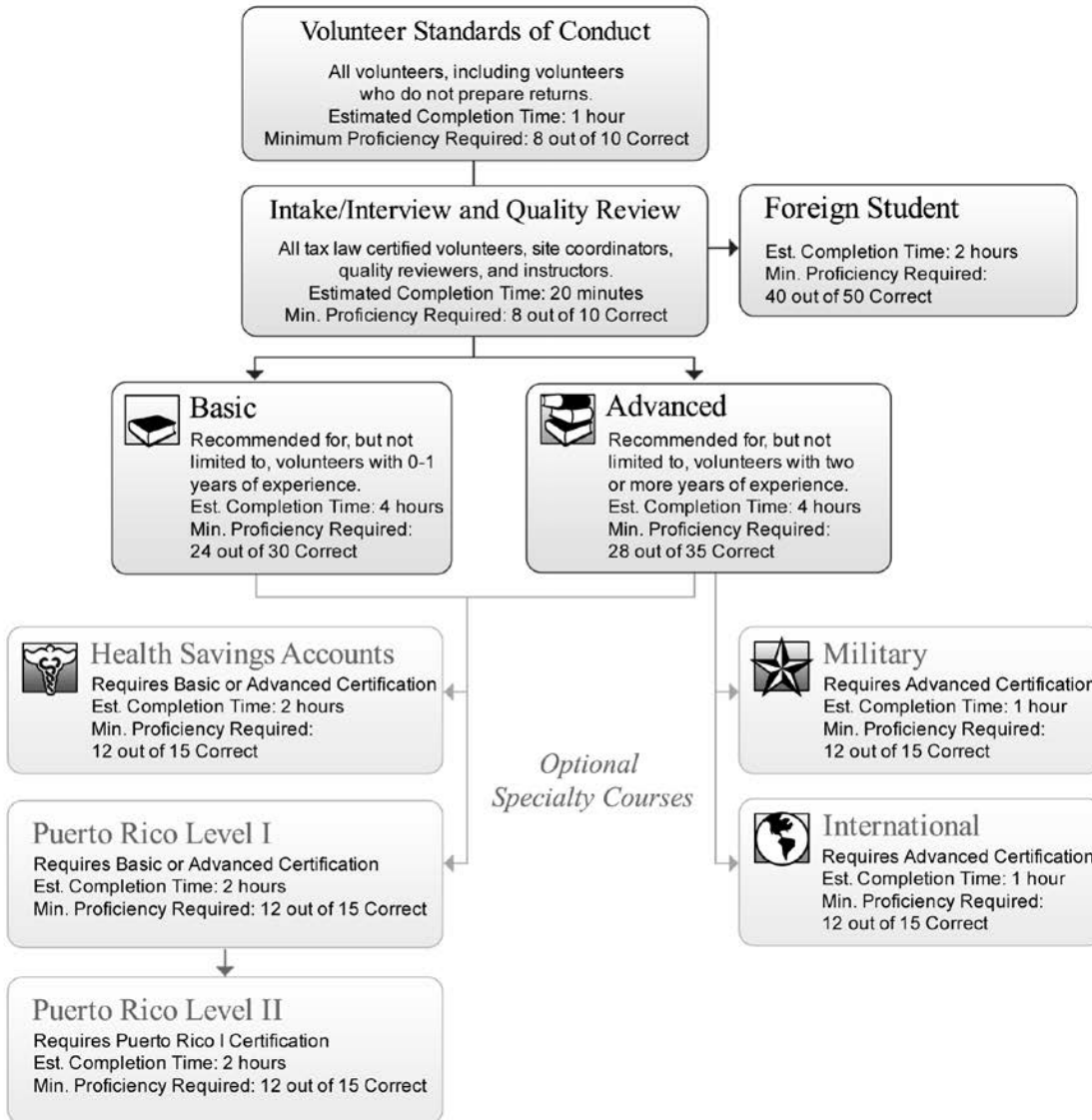
## **REQUIRED:**

- **New Volunteers: Three (3) days of in-person training.**
- **Returning Volunteers: One (1) day of in-person training.**

Contact the OC Free Tax Prep Campaign to find out how to sign up as a VITA Volunteer and to access our trainings.

[vita@unitedwayoc.org](mailto:vita@unitedwayoc.org)





## Basic

- Wages, Interest Income
- Social Security
- Retirement Income
- Schedule A, Itemized Deductions

## Advanced

- Capital Gains
- Schedule C, Sole Proprietorship
- Cancellation of Debt

## Additional

- Health Savings Accounts
- Foreign Student
- Puerto Rico



# VITA Certification

1. All volunteers are required to annually complete the Volunteer Standards of Conduct (VSC) (Ethics) Training and pass the VSC test with a score of 80% or above, prior to working at a site.
2. Volunteers who answer tax law questions, instruct tax law, prepare or correct tax returns and/or conduct quality reviews of completed tax returns are required to be certified in tax law.
3. Volunteers who assist in various roles (for example, greeters, client facilitators, receptionists, equipment coordinators, interpreters, etc.) do not have to certify in tax law if they do not provide tax law assistance.
4. All VITA instructors must be certified, at a minimum, at the Advanced level.
5. All VITA Site Coordinators must be certified, at a minimum, at the Advanced level.
6. Coordinators must also complete annual Site Coordinator Training prior to the site opening.
7. Once certified, all volunteers must send their digitally completed FORM 13615, Volunteer Standards of Conduct Agreement to OC United Way by January 18, 2017.