

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:

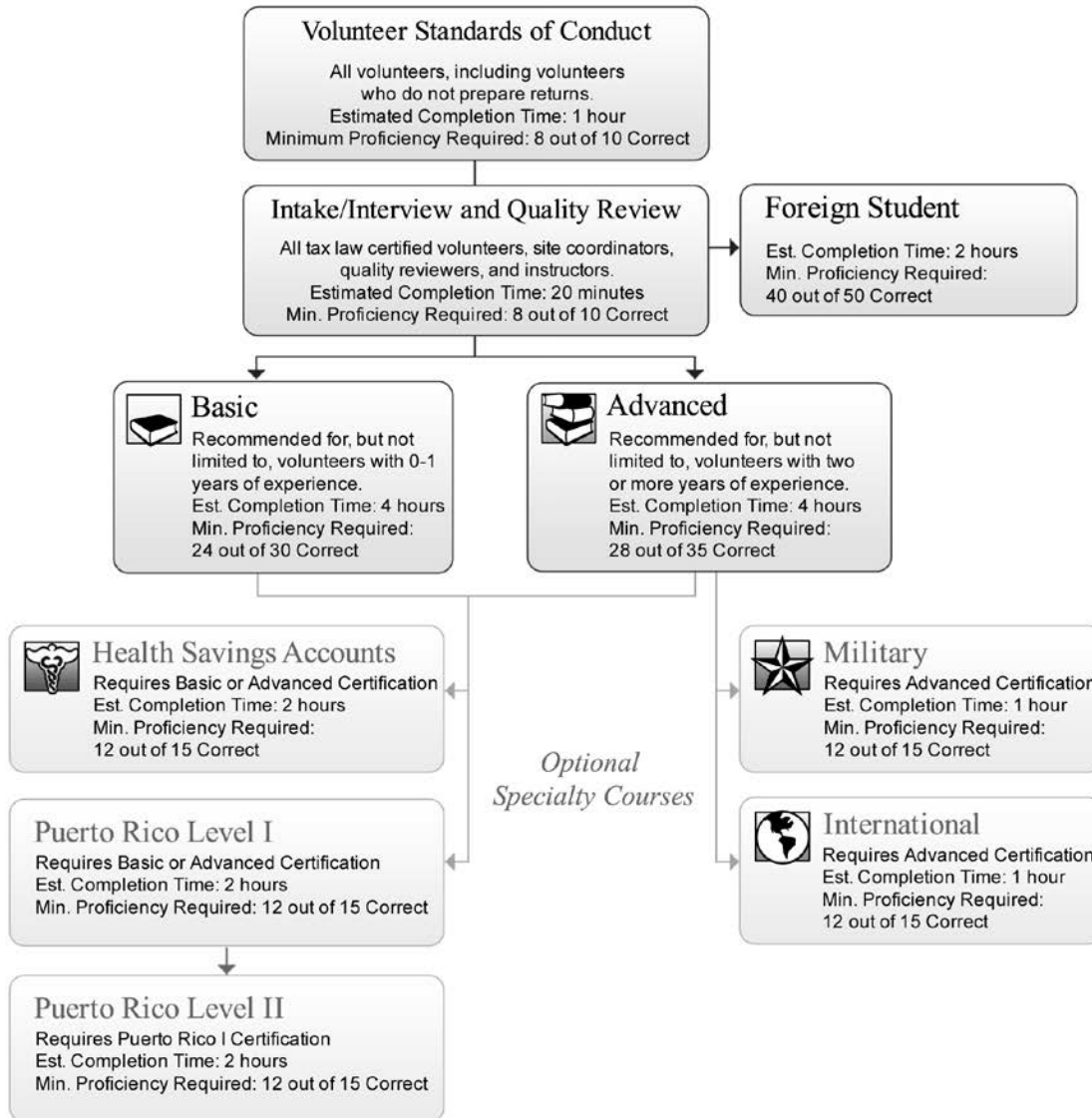
- **New Volunteers: Two (2) days of in-person training.**
- **Returning Volunteers: One (1) day of in-person training.** Contact

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



VITA Levels of Certifications



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. By January 16, 2020, all volunteers must send their digitally signed FORM 13615, Volunteer Standards of Conduct Agreement to Orange County United Way.