

Welcome to VITA Training

By the end of this module you will

- Understand the Intake process
- Understand the 10 Quality Site Requirements
- Understand the 6 Volunteer Standards of Conduct
- Understand the IRS certification process
- Be prepared to take the IRS Volunteer Standards of Conduct Certification test
- Be prepared to take the IRS required certification for tax preparation

Topics in this module

- VITA Basics
- Scope of Tax Returns
- Quality Site Requirements (QSR's)
- Volunteer Standards of Conduct
- Re-Cap

VITA Basics:

Successful tax preparation can be summed up in five key points:

Always follow these *golden rules*:

- Use the Intake Form 13614-C correctly. (Page B-4 in Pub 4012)
- Talk to the Taxpayer. Review the intake form for accuracy and engage the taxpayer in the process. Ask questions.
- Stay within scope of your certification and the program
- Have everything quality-reviewed. Everything must be double-checked during the QR process.
- Use your Resources: IRS Pub 4012, Pub 17, and your VITA teammates.