

VOLUNTEER SITE ORIENTATION AGENDA AND GUIDELINES

Introducing volunteers to their tax site is an extremely important step in making them comfortable for the upcoming season.

Site orientations are a great time to:

- Introduce yourself, and other VITA site staff
- Allow volunteers to mix and mingle with each other
- Lay out expectations for how the site will be run
- Go over all logistical issues
- Build relationships with your volunteers

It is extremely important to assign a leader for site orientations. Will this be the site coordinator or an assistant that works closely with volunteers throughout the season? Either way, one person should take the lead on running orientation; this ensures that everything will run smoothly.

Let volunteers know that any position they hold at the site is critical to how things run. An effective way of doing this is to share how volunteers are involved at each step of the client process—greeting, intake, tax preparation, quality review and sorting.

The most effective way to structure orientation is to take volunteers through the flow of the tax site, from a client entering to a client leaving. At each step discuss the important topics and issues that often arise. Give volunteers some time to practice or role play, if appropriate. Pair returning volunteers with new volunteers and circulate as much as possible to answer questions.

PLAN AHEAD!

Make sure you have the following materials ready at your orientation:

- Volunteer materials for reference (Publications 4012 and 17)
- Any presentation that you plan to share (PowerPoint, videos, etc.)
- Refreshments (optional, only if your budget allows)

VOLUNTEER ORIENTATION AGENDA

All sites are different, so please add anything you feel would be helpful for volunteers to know.

- **Welcome and many thanks**
One of the most important things you can do to retain a volunteer is say thank you! Let them know how excited you are to start the season and that you can support them with any questions they may have. Tell them your plan for the day/orientation. Remind them to ask questions at any time throughout the process.
- **Introduce yourself (and any other site staff)**

Share a quick background—how long have you been with the site? What’s your favorite thing about being at a tax site? Do you have a touching or funny story you can share about working at a tax site?

- Introduce the VITA program and how it operates within the organization
- Talk about how your VITA site is part of the United Way of the Bay Area’s Earn It! Keep It! Save It! coalition
- What’s in it for you and why this work matters: volunteers learn tax law, helping your community, saving people money in tax preparation fees and getting them their entire refund and EITC if eligible, etc.

- **Get to know each other**

Introduce an icebreaker so volunteers get to know each other. At the minimum, have each volunteer share their name, if they’re new or returning and one interesting thing that many people don’t know about them.

To generate ideas visit - <http://www.icebreakers.ws/>

- **Logistics**

Cover all the logistics of your site. Discuss the parking situation. Point out bathrooms. Show where supplies will be or where to find volunteer nametags and snacks. Cover when your site is open throughout the season. What time should they arrive? How can they sign up for a shift? How can they let you know they aren’t coming for a shift? Promote the buddy system—walk in pairs to the parking lot after shifts! How should they get in touch with you? Remind volunteers to keep an updated online schedule and report their volunteer hours often.

- **Volunteer Support**

You are an integral part of your VITA site but you are never on your own! Here are resources that you can depend on:

- Earn It! Keep It! Save It! Website
- Site Coordinator and other experienced volunteers: they are great resources at your fingertips. Connect with them at your site – your questions and concerns will be addressed!

- **Materials and other resources at your site:**

TaxSlayer can be quite daunting to new (and returning) volunteers. This is a great time to show everyone how to login and offer a place to practice. Also, highlight the importance of the resource materials below. They are there to be used. It’s recommended that you teach your volunteers to find information and answers on their own from the materials as a first step before asking their site coordinator for help. This will free up a lot of time for the site coordinators and experienced volunteers.

Resources:

- Reference materials they can find at each station: Publication 4012 (spiral bound book to bring to the site and Publication 17 and 1040 Instructions
- Form 13614-C - Intake/Interview Sheet
- California Volunteer Manual
- VITA Hotline - (800) 829-8482 (for volunteer use only) and TaxSlayer Hotline - 800-421-6346
 - Can find them on the back of 4012
 - Do not give these numbers to taxpayers!
- IRS Tax-Help - (800) 829-1040 (for public use)
- Where’s My Refund? - (800) 829-1954 or online at <http://www.irs.gov/individuals/article/0,,id=96596,00.html>

- **Positions at your site:**

Review these positions at your site and what each of them are responsible for as well as how they work/flow together

- Site Coordinator

- Tax Preparer
- Screener
- Greeter
- Quality Reviewer

- **Client Flow**

What the VITA program looks like at your site. Discuss the overall VITA program and the requirements

- **Greeting and intake**
Where will this take place? What does the process look like? Make certain that volunteers know all the key points. Repeat income guidelines.
- **Screening for Eligibility**
Review how important the screening process is and what documents to review
- **Tax preparation**
Remind volunteers to ask questions if they are uncomfortable with a return. Let volunteers know that it's okay to consult their reference materials for additional information.
- **Quality review**
Share your procedure about how this process works and who conducts the QR. Do you like volunteers to raise their hand or stand up and wait? This is a helpful time to add that sites get hectic and they may be waiting for some time.
- **Reviewing the return with the client**
Show the volunteers how to review the return with the client. This is an educational opportunity...teach the taxpayer about their own tax situation by pointing out where their AGI can be found, how many exemptions they have, which deduction they took and where to find the amount, what their tax liability is, the credits they received and the amount of their refund or balance due
- **Finishing up a return**
Show your volunteers the procedures to follow when they are done preparing a return, e.g.: show them how to create an e-file, updating the status of a return, labeling client folders, and what goes inside of a completed folder, etc.

- **What returns can I prepare?:**

There are restrictions on the types of returns that can be prepared at VITA sites

- Review Scope Chart in 4012
- You can only prepare returns that are in scope for your certification level
- Always check with your Site Coordinator if you have questions or if you have any doubt
- Can refer taxpayers to other sites - <http://earnitkeepitsaveit.org/find-tax-help-now>
- DO NOT TRY TO PREPARE A RETURN THAT YOU ARE NOT CERTIFIED TO PREPARE - YOU ARE NOT DOING THE TAXPAYER ANY FAVORS!

- **Special Populations**

This is important as we help a diverse group of filers. Please spend a few minutes discussing the following:

- ITINs- Individual Taxpayer Identification Number
 - Describe what an ITIN is and what a volunteer can expect to see when someone has an ITIN - and how these returns are treated in the preparation process (exactly the same!)
 - If you are a Certifying Acceptance Agent (CAA) discuss what that means, how this will directly affect the volunteer and the steps to take when servicing clients that need ITINs.
 - If you are not a CAA explain that the most efficient process for both your site and clients is to refer all filers that need an ITIN number to CAA sites. Having a list of those sites readily available will be useful (or circle them on your county flyer).

- Taxpayers with disabilities
 - Please communicate with your volunteers about all the procedures at your VITA site in regards to helping taxpayers with disabilities. It is important that we are up to date on all things nondiscrimination and ADA compliance. Your site is responsible for making reasonable accommodations for taxpayers with disabilities
 - For more information on training or resources for you and your volunteers - visit www.reitour.org and for a 16 minute training video you can show during your orientation, visit: <http://www.youtube.com/watch?v=8vS3pCe0eO4>

- **Professionalism and Confidentiality**

Volunteering at a VITA site and preparing tax returns takes a great deal of professionalism and more importantly confidentiality. Here are topics to address:

 - Dress code and name badges
 - Adherence to Title VI (nondiscrimination) regulations
 - Review Standards of Conduct for Volunteers and remind them about the Ethics exam they already took
 - Form 13615: Volunteer Agreement (must be turned into the Site Coordinator before volunteering)
 - Certification
 - Availability: Volunteers must provide advance notice if unable to make a shift
 - Volunteer Protection Act of 1997: let your volunteers know as long as they adhere to the rules they are free of any liability when preparing tax returns.

- **Other services offered at your VITA site**

Share what other services will be available at your site. Make sure volunteers know that asset building and financial services are critical at every stage of the client process.

- **Other items to discuss:**
 - EKS Materials to distribute (client referral card, EKS volunteer recruitment business card)