

Nashville Alliance for Financial Independence
Frequently Asked Questions by Prospective VITA volunteers

1.) What is VITA?

VITA stands for Volunteer Income Tax Assistance. VITA is a nation-wide program started and managed by the Internal Revenue Service to utilize community partners and volunteers to provide free tax preparation for low-income taxpayers. In Davidson County, the IRS partners with the Nashville Alliance for Financial Independence (NAFI), an initiative of United Way of Metropolitan Nashville. NAFI provides a supportive and streamlined network for organizations that operate VITA sites to share resources, marketing and referrals, training, volunteer recruitment, and more, as well as a supportive and centralized location for interested community members to receive training to become VITA volunteers.

2.) Is VITA available outside of Davidson County?

Yes, VITA is available in other counties in Tennessee, but those VITA sites are not part of the Nashville Alliance for Financial Independence's network. Those interested in volunteering outside of Davidson County can find other coalitions like the Nashville Alliance for Financial Independence through our statewide VITA network at: www.TNAFI.org.

3.) Do I need tax preparation experience?

NO! Really! VITA volunteers come from all different walks of life and professional backgrounds. Some have a lot of experience and some have absolutely no experience. We have volunteers that are retired, college students, administrative assistants, medical professionals, and more. The only main requirements for becoming a VITA volunteer are time, willingness to serve, and a comfort with computers (since the taxes are prepared on the computer). Of course, we do have many accountants that do serve as VITA volunteers, but it is certainly not a prerequisite for becoming a VITA volunteer. Our training for new volunteers is designed for the individual that has no experience.

4.) Do I have to be good at numbers?

Not really. The tax preparation software that we use does all of the calculating for you.

5.) How many hours does it take to train to be a VITA volunteer?

For a new volunteer, it is a larger investment in time at approximately 16-20 hours. For a returning volunteer, it is approximately 8-10 hours of training. For an individual who is a tax professional and a new volunteer, it is between 10-15 hours. The training helps the volunteer to become competent in both the tax law and the tax software used to prepare returns at the site. For more information, go to: <http://nashvilleafi.org/VolunteerCenter.htm>

6.) How do I sign up for training?

All training requires online registration. Trainings are posted through our website according to which type of volunteer that you are: 1.) New, 2.) Returning, 3.) Tax professional. For more information, go to: <http://nashvilleafi.org/VolunteerCenter.htm> and click the appropriate button that describes you.

7.) What is the certification test like and is it hard?

Once you complete the series of trainings required for a volunteer, you will take an online IRS certification test. This test is open book and is not timed. If you like, you can have access to the tax software to help you prepare the return scenarios found in the test. The test can be difficult for a new volunteer, but it is meant to accurately measure if you are ready to prepare returns. You must score 80% or above to pass. You have two chances to successfully pass the test and there are even practice problems that you can do prior to taking the test to measure your readiness.

8.) Is there a deadline to get certified?

Yes, our goal is that volunteers will complete their certification by January 16. This ensures that volunteers are ready to serve at the site when our sites are at their busiest. If you do not finish your certification by this deadline, you will still have the opportunity to certify but it may be difficult to access a computer with the tax software that you will want to use while taking the test.

9.) Is there a minimum number of hours that I must volunteer?

No, but our hope is that a volunteer will serve at least 15-20 hours per month during the months of January-April. The sites tend to be busiest late January through mid-February and during the few weeks prior to April 15.

10.)What if I do a return wrong? Am I liable for the mistake?

Our sites work hard to create a culture of quality. Accurate returns are of utmost importance. All volunteers are required to participate in quality review of ALL returns and most of our sites are secret shopped by other VITA volunteers and by the IRS to ensure that sites have IRS protocol in force. With that said, if you still make a mistake, you are covered under the Volunteer Protection Act as long as the return that you completed was within the scope of your VITA certification level. If you prepared a more complex return that you are not certified to do, then you do open yourself up to liability of that return. This is why it is important that you refer returns outside of your scope of certification to other volunteers that are certified at higher levels.

11.)Where are the VITA sites?

Currently, the Nashville Alliance for Financial Independence works with 15-18 different sites across Davidson County. Between all of these sites, volunteers are needed during the day, evening, and on weekends (including Sunday). Once you register for VITA training, you will receive information about the various locations. Because individual VITA sites cannot handle the capacity of incoming calls from prospective taxpayers, the list of sites is not posted publicly. Instead, we refer prospective taxpayers to dial 2-1-1, our information & referral line for the closest VITA site and items to bring.

12.) Once I am at the site, will there be anyone to help me if I have questions?

Yes! Each site has a trained Site Coordinator. Most are certified at intermediate and advanced levels and are there to help ensure that you and the site have whatever is needed to succeed. In addition to your Site Coordinator, the IRS has a toll-free phone number just for VITA volunteers that you can call with tax law questions.

13.)What kind of recognition do I receive as a VITA volunteer?

Professionally, VITA is a wonderful skill to add to your résumé and a great way to show your supervisor that you are advancing in your professional skills. To ensure that your supervisor knows about your achievement as a VITA volunteer, United Way of Metropolitan Nashville will send a personalized letter to your supervisor that will describe the time and value that your volunteer service brought the VITA program. Additionally, for the past several years, Congressman Jim Cooper has hosted a VITA volunteer reception for VITA volunteers where each one received a frame-worthy Certification of Special Congressional Recognition.

14.)I'm interested, but I'm still not sure if I can/want to volunteer. How can I learn more?

We are hosting informational sessions for prospective volunteers. To register, go to: <http://nashvilleafi.org/volunteer-center-new-volunteer.htm>