

How to Become a United Way Tax Volunteer – Step by Step

1. Complete the following documents and send to taxvol@uwca.org;
 - a. Photo of Driver's License, Non-Driver's ID, or Passport
 - b. VITA Volunteer Income Tax Assistance Volunteer Application
 - c. UWCA Confidentiality Agreement
 - d. IRS Form 13615 Volunteer Standards of Conduct Agreement
2. Sign up through My Way for Self-Paced Recorded Training: <https://givepul.se/9fii8u>
3. Watch for an automated email from "United Way Volunteer (notification@givepulse.com)".
4. Click the link in email to access Zoom recording, using Zoom password also included in email. If possible, use a double screen, a large screen that can be split, or watch the video on one device while following instructions to prepare returns on another.

Follow instructions in the Zoom recording:

5. Set up your TaxSlayer Practice Lab account – make note of your Username and Password (instructions in "United Way Volunteer Tax Training" packet)
6. Prepare 3 returns from Advanced test in Practice Lab
7. Discuss test questions and how tax law applies
8. Make notes on your copy of test of how you will answer each question

After watching Zoom recording:

9. You can check your Advanced answers using www.vitaresources.net pre-test (scroll to end of this webpage to find the test). Follow up on any questions you miss to make sure you determine the correct answer

Ready to take the tests?

10. Use "Link & Learn Quick Start Guide" packet to set up password to the [Link & Learn testing portal](#).
 11. Use your notes for reference and take tests in order:
 - a. Volunteer Standards of Conduct
 - b. Intake Interview
 - c. Advanced
 12. If you pass with 80% or higher, select box/tab to sign your "Volunteer Agreement."
 13. Email signed Volunteer Standards of Conduct Agreement 13615 to taxvol@uwca.org.
- ❖ **IF YOU DO NOT PASS – STOP!** Prepare your retest answers on paper and check with United Way to verify answers before taking the retest online.

After we receive your Form 13615 Volunteer Standards of Conduct Agreement with test results:

14. We will send you an email with a link to complete a background check. Please complete as quickly as possible.
15. When we receive confirmation that you have passed your background check, we will send you a link to schedule times to volunteer through My Way.
16. Sign up for times to volunteer!

- ❖ When you come to volunteer arrive at 3600 8th Ave South, Spain Community Chest entrance.
 - Door to the reception will be immediately to the right.
- ❖ Dress code in our building is business casual. Neat jeans and plain t-shirts are fine, but please avoid shorts, workout leggings, or t-shirts with large graphics.
- ❖ We have a breakroom with a fridge and microwave that is available for use if you would like to bring any snacks/lunch. Coffee, ice, and water dispensers also available too, so bring your favorite water bottle or travel mug!