

NEW VOLUNTEERS

VITA Volunteer Training & Certification Requirements



United Way
of Washtenaw County

In-person training sessions are held on various dates in Dec & Jan. Register for [in-person training online here](#). Certification exams are [accessible online here](#).

Intake & Exit Specialist

- **VITA 101** Covering all of the basics volunteers need to know: Our core values, customer service expectations, how our clinics operate, volunteer roles and requirements, and the foundational tax law basics (3 hours)
- **Volunteer Standards of Conduct Exam (30 minutes or less)**
- **Intake/Interview and Quality Review Exam (1 hour or less)**

Tax Preparer

- **VITA 101** Covering all of the basics volunteers need to know: Our core values, customer service expectations, how our clinics operate, volunteer roles and requirements, and the foundational tax law basics (3 hours)
- **Federal Returns Training** Deeper dive into the key aspects of completing Federal Returns in our TaxSlayer software, including completing two certification exam questions to get started; Learn about the return close-out and exit process. (3 hours)
- **Michigan Returns Training** **Prerequisite: Must have completed Basic or Advanced Exam.* Deeper dive into the key aspects of completing Michigan Returns in our TaxSlayer software, including the most common errors; Volunteers will complete 3 MI returns during this training. (3 hours)
- **Volunteer Standards of Conduct Exam (30 minutes or less)**
- **Intake/Interview and Quality Review Exam (1 hour or less)**
- **Basic Exam (4-8 hours) OR Advanced Exam (4-8 hours)**
**NOTE – You do not have to take both the Basic and Advanced exams-only one is required to become certified.*

Optional Exams: The following exams are not required but are encouraged!

- **Health Savings Account (HSA) Exam (30 minutes)**
- **Foreign Student Exam**