NEW VOLUNTEERS

VITA Volunteer Training & Certification Requirements

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