

RETURNING VOLUNTEERS

VITA Volunteer Training & Certification Requirements



United Way
of Washtenaw County

Below are the minimum requirements for returning volunteers, but VITA 101, Federal Tax Training & Michigan Tax Training are available, for volunteers that desire a refresh!

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 Refresh** A streamlined overview for returning volunteers: recap of last year's results, review of our program's values and goals, changes in tax law, improvements to clinic operations and documents. (3 hours)
- **Volunteer Standards of Conduct Exam (30 minutes or less)**
- **Intake/Interview and Quality Review Exam (1 hour or less)**

Tax Preparer

- **VITA Refresh** A streamlined overview for returning volunteers: recap of last year's results, review of our program's values and goals, changes in tax law, improvements to clinic operations and documents. (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.*

Quality Reviewer

Prerequisite: Must have at least one year of tax prep experience

- **VITA Refresh** A streamlined overview for returning volunteers: recap of last year's results, review of our program's values and goals, changes in tax law, improvements to clinic operations and documents. (3 hours)
- **Quality Reviewer Training** Overview of the QR role: how to identify common errors and hints using the new QR checklist; Overview of the new closeout process. (2 hours) (Training date TBD)
- **Volunteer Standards of Conduct Exam (30 minutes)**
- **Intake/Interview and Quality Review Exam (1 hour)**
- **Advanced Exam (4-8 hours)**

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

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