

# 2016 Volunteer Tax Season

Hello Continuing and Potential Tax Volunteers,

Thank you for your new or continuing support and interest in our annual Fort Sill and Lawton military community individual income tax service. Click on the document, [How to become an ITAC volunteer](#), on the homepage so that you can read about the benefits of volunteering. There are information for taxpayers (Military ID card holders in accordance with AR 27-3) to use our free services but anyone can use the volunteer resources for training, certification, and preparing returns. These resources might be updated as we get closer to the start of the tax season.

Before the first date you volunteer you must pass a few online certification tests. First do these tests on paper and when you feel reasonably confident with your paper answers only then go online at the [IRS VITA/TCE Central site](#) to do the real test with the same or similar questions. You will have two attempts for each exam to pass with a score of 80% or higher. When you have passed all of your online exams, the test site can generate your Volunteer Agreement form that you should sign and give you the site coordinator where you will be volunteering (give to Sheila if you are volunteering at Fort Sill ITAC).

The [Volunteer Standards of Conduct - Ethics Training and Test](#) is just 10 questions. After passing this test volunteers should take the training and test for [Intake/Interview & Quality Review](#) with another 10-question test.

To prepare tax returns volunteers must then do the self-study for either the Basic\* or Advanced (Advanced includes Basic topics) training and pass the related exam. I encourage returning volunteers and ambitious new volunteers to jump to the Advanced training and exam so we can service a wider range of taxpayers. Basic, Advanced and other exams can be [downloaded here \(PDF files\)](#) or found in the printed training kits (see below). Use [IRS Publication 4491](#) as a reference. Before answering some Basic and Advanced Tests questions you will first prepare tax returns that can be done using the online [Practice Lab](#) resource (password required). If you need more help learning the materials plan to attend the supplemental live training mentioned below.

A limited number of printed training kits will be available for pick up from the Fort Sill Installation Tax Assistance Center VITA Coordinator. You may want to call first (580)442-6445 to make sure someone is in. The printed training kit includes [Publication 4012 - Resource Guide](#) and [Publication 6744 - Test/Retest](#).

All volunteering and the supplemental live training will be held at Truman Education Center, 3281 Sheridan Road. Volunteers are required to study on their own time with the supplied training materials and online resources for federal tax returns, unless they sit in on live training from December 5<sup>th</sup> 2016 through January 20<sup>th</sup>, 2017. The supplemental live training dates are Monday through Friday, December 5, 2016 through January 20, 2017, 9am - 4pm at the Truman Education Center, 3281 Sheridan Road, Fort Sill, OK.

Basic federal and Oklahoma tax rules and preparation procedures will be reviewed, as well as, Advanced tax rules, hands-on computer use and efilng will be covered in class. You do not need to pass the certification exams to attend these live training dates. Certification is required by the first day you volunteer.

Our free tax preparation service will be offered at Bldg 4700, 4<sup>th</sup> floor, Tax Center during Monday through Fridays from 9:00am to 4:30pm (doors closed at 4:30). We will also be open the first 4 Saturdays from 9-4:30. A sign-up sheet will be available on the training days so you can select the days you want to volunteer. Come a little early to help set up and stay to finish your last return for the day. Easy returns could take as short as 15 minutes. Harder returns could take an hour. We may ask the taxpayers to come back the next scheduled date if we cannot finish or they are missing information. All returns must be processed and reviewed with the procedures set by the IRS. We try to pair up volunteers so can support each other. Experienced volunteers are available to answer questions. You are not liable for any mistakes as long as you follow the authorized guidelines. As volunteers we should gently decline the offer of any compensation from taxpayers.

Email me ([Sheila.s.olsen.civ@mail.mil](mailto:Sheila.s.olsen.civ@mail.mil)) to reserve your seat for the training workshops.

Thank you,  
Sheila Olsen