



# Volunteer Checklist

## 2<sup>nd</sup> Year Tax Preparers

- Update your information in VolunteerHub**  
Log in to VolunteerHub (<http://dceitc.volunteerhub.com>).  
Click "Your Account" on the top right hand corner of the screen.  
Ensure that ALL required fields are updated.  
(If you forgot your username or password, contact Volunteer Coordinator Caitlin Brazner: [volunteer@dceitc.org](mailto:volunteer@dceitc.org) or 202-419-1440 x111)
- Select preferred role, tax site, and shift**  
-Under "Events", scroll down to the listings that start with "Tax Preparer"  
-Find your preferred tax site and date; Click "Sign Up"; Submit your registration  
Contact Caitlin Brazner ([volunteer@dceitc.org](mailto:volunteer@dceitc.org)) if your preferred shift is full.
- Register for training\* (Training Dates on next page)**  
Training classes are listed below the Tax Preparer registration section.  
Second Year Volunteers are encouraged to take Intermediate Topics, but may take Basic TaxWise instead or take both classes.

The 3 Required trainings should be completed in this order:

*Basic Tax Preparation* (4 hours)

*Intermediate Topics & TaxWise Software* (4 hours)

(Includes Schedule C-EZ, itemized deductions, simple pensions.)

*Or Basic TaxWise Software* (4 hours) (instead of intermediate)

*IRS Certification Class* (4 hours)

Optional Additional Trainings:

*Advanced Topics & IRS Certification Class* (4 hours) Includes practice with Advanced level returns and an opportunity to work on certification test(s).

- Attend Trainings and Complete IRS Certification**  
2nd year volunteers are strongly encouraged to certify at the Intermediate level. All preparers MUST pass Basic certification
- Attend Orientation and Volunteer!**  
Most tax sites will have orientation the week of January 23. Your site coordinator will contact you with details about orientation. Sites open as early as January 28. Check the site list for the opening date of your tax site.
- Submit signed Volunteer Agreement and Present ID.**  
Print your Volunteer Agreement with your certification scores. Bring your signed Volunteer Agreement and picture ID to your first volunteer shift.  
[See [www.dceitc.org/pdfs/certification.pdf](http://www.dceitc.org/pdfs/certification.pdf)] for printing instructions.  
  
To comply with IRS regulations your Site Coordinator must have your signed Volunteer Agreement on file at the site where you volunteer and must see your picture ID to confirm your identity.

◀ Dec 2010		~ January 2012 ~					Feb 2011 ▶
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b> Basic Tax Preparation 9:00-1:00 Basic TaxWise 1:30-5:30 Intermediate 1:30-5:30	
<b>8</b>	<b>9</b> Basic TaxWise 5:30-9:30  Intermediate 5:30-9:30	<b>10</b>	<b>11</b> Certification 5:30-9:30  Basic Tax Preparation 5:30-9:30	<b>12</b> Basic TaxWise 5:30-9:30  Intermediate 5:30-9:30	<b>13</b>	<b>14</b> Basic Tax Preparation 9:00-1:00 Certification 9:00-1:00 Intermediate 1:30-5:30 Basic TaxWise 1:30-5:30	
<b>15</b> Certification 1:00-5:00 Intermediate 1:00-5:00	<b>16</b> Martin Luther King, Jr. Holiday	<b>17</b> Basic TaxWise 5:30-9:30	<b>18</b> Intermediate 5:30-9:30	<b>19</b> Certification 5:30-9:30	<b>20</b>	<b>21</b> Basic Tax Preparation 9:00-1:00  Basic TaxWise 9:00-1:00 & 1:30-5:30	
<b>22</b> Basic TaxWise 9:00-1:00 Intermediate 9:00-1:00  Certification 1:30-5:30	<b>23</b> Basic TaxWise 6:30-10:30  Certification 6:30-10:30	<b>24</b> Certification 6:30-10:30	<b>25</b>	<b>26</b>	<b>27</b> Certification 2:00-5:00	<b>28</b> Campaign Launches	
<b>29</b>	<b>30</b>	Notes:					
			Georgetown University Law School	American University Law School	American University Business School		