



# Volunteer Checklist

## 3rdYear (and beyond) 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 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.  
*\* Note: Volunteers who would like additional practice should follow the 2<sup>nd</sup> year training path instead of the trainings below.*

**Required Trainings:**

*Refresher for Experienced Preparers* (4 hours)  
This class requires that you be comfortable with Schedule A and C-EZ. If you are not comfortable with both, you should take the 2<sup>nd</sup> year training path  
**OR *Online IRS Refresher and Certification.*** Access Link and Learn training at: <http://www.irs.gov/app/vita/> and select “Returning Student.”  
**Do NOT register for Refresher if you plan to train online.**  
You can get a copy of the training materials at :  
CAAB (14 & I NW, Caitlin at 202-419-1440) or CTA (2<sup>nd</sup> & D SE, 202-547-7773).

**Optional Additional Trainings:**

*Advanced Topics & IRS Certification* (4 hours)  
Strongly encouraged for volunteers who have never certified at Advanced.

*Reviewer Training* (4 hours)  
Topics covered in this training also help make you a better preparer. Not everyone who takes training will be asked to serve as a reviewer.
- Complete IRS Certification**

Experienced volunteers are strongly encouraged to certify at the Advanced level. The IRS requires volunteers to certify at at least the Basic level and to prepare, review and assist with returns within their certification level.  
(Certification may be completed at Refresher, IRS Certification class, or online through Link & Learn (see [www.dceitc.org/pdfs/certification.pdf](http://www.dceitc.org/pdfs/certification.pdf)))
- 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.

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> <b>Advanced Topics</b> 1:30-5:30  <b>Refresher</b> 9:00-1:00		
December Trainings at Capital Area Asset Builders (14 <sup>th</sup> & I Streets NW): <ul style="list-style-type: none"> <li>• Refresher: 9am on Dec. 3 and 5:30pm on Dec. 5.</li> <li>• Quality Review: 1:30pm on Dec. 3 and Dec. 10 and 5:30pm on Dec. 8</li> <li>• Site Coordinator: 9:00am on Dec. 10.</li> </ul>								
<b>8</b>	<b>9</b>	<b>10</b>	<b>11</b>	<b>12</b>	<b>13</b>	<b>14</b> <b>Advanced Topics</b> 1:30-5:30		
<b>15</b> <b>Quality Review</b> 1:00-5:00	<b>16</b> <b>Martin Luther King Jr. Holiday</b>	<b>17</b> <b>Refresher</b> 5:30-9:30	<b>18</b>	<b>19</b> <b>Advanced Topics</b> 5:30-9:30	<b>20</b>	<b>21</b> <b>Advanced Topics</b> 1:30-5:30		
<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>	<b>26</b>	<b>27</b>	<b>28</b>		
<b>29</b>	<b>30</b>	Notes: <table border="1" style="margin-left: auto; margin-right: auto;"> <tr> <td style="background-color: #e0ffe0;">Georgetown University Law School</td> <td style="background-color: #ffe0e0;">American University Law School</td> </tr> </table>					Georgetown University Law School	American University Law School
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