



# Volunteer Checklist

## Savings Promoter / Intake Specialists

- Register or update your information in VolunteerHub**  
New Volunteers:
  - Register at <http://dceitc.volunteerhub.com>Returning Volunteers:
  - 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, Volunteer Coordinator Caitlin Brazner: volunteer@dceitc.org or 202-419-1440 x111)
  
- Sign up as a Savings Promoter / Intake Specialist**
  - Under "Events", scroll down to the listings that start with "Savings Promoter"
  - Find your preferred tax site and date
  - Click "Sign Up"
  - Submit your registration
  
- Register for Savings Promoter Training (4 hours)**  
Training classes are listed below the Tax Preparer registration section.  
Choose Jan. 5, Jan. 14, Jan. 22
  
- Complete IRS required Volunteer Standards of Conduct Certification**  
online on IRS.Gov Link and Learn. (see instructions, next page)
  
- Attend Orientation and Volunteer!**  
Tax sites open Saturday, January 28th. Most tax sites will hold an orientation the week prior to opening. Your site coordinator will contact you with details about orientation.
  
- Submit signed Volunteer Agreement and Present ID.**  
Bring your signed Volunteer Agreement to your first volunteer shift.

To comply with new IRS regulations your Site Coordinator must have your signed volunteer agreement on file at the site where you volunteer and must confirm your identity.

# Volunteers Standards of Training Certification

If you experience problems, use Internet Explorer.

## Logging into Training

Go to: <http://linklearn.webtechteam.com/login.aspx>

- Click "Create an Account"
- You will be taken to the registration form
  - For **Group**, enter "1-VITA Volunteer"
  - After filling in remaining information, click **Register**.
- After confirming your information, you will be taken back to the login screen where you can log in right away. An email with your username and password will also be sent from "DONOTREPLY@velocelearning.com" with the subject "Your LMS account has been created".
- The training should launch automatically, but if it does not:
  - Make sure your pop up blockers are off
  - Click on the "Volunteers Standards of Conduct" link
  - Under the "Launch Course" header, click on "Launch the Course Again"
- If you do not finish the test in one sitting, you can save your work.
- After completing the, click on home
- Click on the "Volunteer Standards of Conduct" link to launch the exam
- After completing the exam, click on "home"

## Printing & Submitting Test Results & Volunteer Agreement

After completing your final test:

1. On the right side of the screen, you will see a box that says, "You may sign your Volunteer Agreement electronically by checking this box."
  - Click on the box
  - Enter your password
2. Under that box, you will now see "**Click here to open and complete your Volunteer Agreement**".
3. Click on the link. It will generate your volunteer agreement with your test results.
4. Click on the printer icon to print the form (make sure to print an extra copy for your records)
5. After printing the form:
  - Under volunteer position(s) enter the position(s) you will fill at this site this year. (Choose from: interpreter, savings promoter/intake, greeter/admin, food stamp specialist, tax preparer, site coordinator, reviewer, e-filer.)
  - Under Number of years volunteered make sure the correct number is entered (cross out and correct the number if necessary)
  - If any of the other fields are not filled in, fill them in
  - Under Volunteer Signature, sign the form
6. Make a copy of the Volunteer Agreement for yourself.
7. **Take your photo ID and the printed and signed volunteer agreement to your tax site the first day you volunteer. (If you volunteer at more than one tax site, you will need to take each site a copy of the agreement.)**