VITA

Volunteer Handbook Edition 6

2025-2026 Edition
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THE COOPERATIVE MINISTRY
3821 West Beltline Blvd
Columbia, SC 29204

www.coopmin.org

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Welcome

Thank you for your faithfulness in volunteering with The Cooperative Ministry's Volunteer Income Tax Assistance (VITA) Program. The Cooperative Ministry exists to:

> *Increase the economic self-sufficiency of people experiencing poverty in the Midlands through crisis assistance and sustainability programs.*

The VITA Program is one of our sustainability programs and is federally funded through the Internal Revenue Service (IRS). VITA provides free tax preparation services for low- to moderate-income individuals and families in the city of Columbia and across the Midlands.

The Cooperative Ministry has been a part of VITA since 2009 when the IRS awarded our first grant. The program has grown from preparing a few hundred tax returns from a single site to several thousand returns and multiple sites. In Tax Year 2025 (January 27, 2025, to October 15, 2025), our VITA program prepared 7,805 federal and state tax returns across 11 tax sites, to include one virtual site (see table 1 for tax site locations). This volume of tax returns is achievable only by the unselfish commitment of volunteers like yourself. The Cooperative Ministry trains and certifies 75 - 100 volunteers annually who then volunteer between 4 – 6 hours per week at one, or more, tax sites.

This manual provides the policies and procedures common to all VITA volunteers. Please review the material in this handbook. Don't be overwhelmed by the information! Experienced VITA staff and volunteers will provide you the needed support throughout the season, beginning with training and certification. Feel free to ask questions.

The Cooperative Ministry sincerely thanks you for your commitment, time, and talents.

Ed Palekas
Director, VITA Program
The Cooperative Ministry

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Table 1: The Cooperative Ministry Tax Sites [1]

SITE NAME [2]	SITE ADDRESS
The Cooperative Ministry	3821 W. Beltline Blvd | Columbia | 29204
Seven Oaks Recreation Center	200 Leisure Lane | Columbia | 29210
Fairfield County Library	300 W. Washington Street | Winnsboro | 29180
NorthStar Christian Center – Main	711 Longtown Road | Columbia | 29229
Rehoboth Global Methodist Church	1410 Sunnyside Drive | Columbia | 29204
Columbia College	1301 Columbia College Drive | Columbia | 29203
Cecil Tillis Community Center	2111 Simpkins Lane | Columbia | 29204
SC Works, Lexington	671 Main Street | West Columbia | 29170
SC Works, Columbia	Virtual Site
University of South Carolina School of Law	1525 Senate Street | Columbia | 29208
Hyatt Park Recreation Center	950 Jackson Ave. | Columbia | 29203
Garners Ferry Technology Center	8614 Garners Ferry Road | Hopkins | 29061
Newberry County Library	1100 Friend Street | Newberry | 29108
Camden First Community Development (Partnering organization**)**	704 Dekalb Street | Camden | 29020
South Carolina Department of Corrections	*The Cooperative Ministry provides free tax preparation to the state's inmate population*

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[1] Site hours vary year-to-year and are coordinated with each host facility at the beginning of the tax year. The exception is our main site; The Cooperative Ministry is open M – Th, 9:00 am – 5:00 pm; F, 9:00 am – 2:00 pm.
[2] Sites may be added or removed each year, depending on partnering agreements.

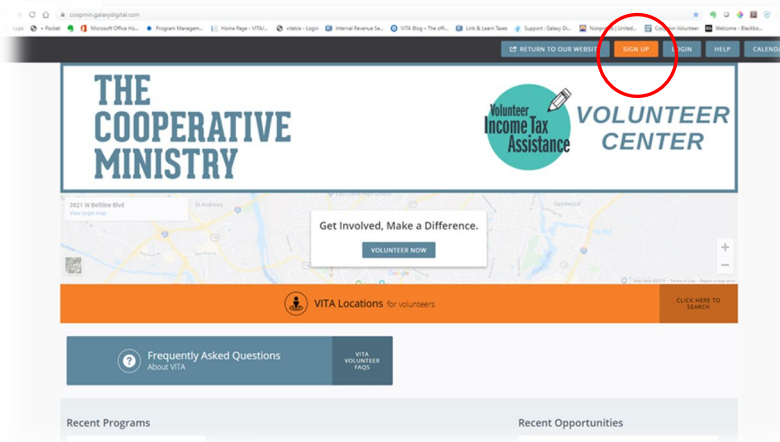# The Cooperative Ministry General Policies

Volunteer Schedules

Volunteers are expected to arrive at their volunteer site 30 minutes prior to their shift start time and check in with their Site Coordinator. Arriving 30 minutes prior allows time for settling in, logging into the tax software, and becoming familiar with new Volunteer Tax Alerts or other information disseminated since the last time a volunteer worked. In the event unforeseen circumstances occur that prevent a volunteer from working a scheduled shift, program staff requests that out of courtesy the volunteer contacts his/her Site Coordinator with the change. Volunteer schedules are managed through our volunteer management software (https://coopmin.galaxydigital.com/) and discussed below in the next section.

Volunteers are encouraged to schedule 4-6 hours per week working at a VITA tax site. Available hours include weekday, weeknight, and weekend hours to accommodate our client's (and volunteers') varying schedules.

Volunteer Portal

The Cooperative Ministry developed a volunteer portal as a resource for volunteers to register, view Tax Site and training schedules, sign-up to volunteer, record volunteer hours and view other pertinent program resources. Follow these procedures to register on the portal:

1. Go to https://coopmin.galaxydigital.com/ on your computer, mobile phone or tablet and click the **Sign-Up** button, located at the top of your screen.

2. You are taken to the first step: **Create an Account**. Enter your name, email address, and the remaining requested information. Although your birthdate is optional, we would like to know your birthday so we can send you a card! Please check the box "Send me texts from this site" so that critical information and alerts are communicated to you when needed. Type a password in both the **Password** and **Confirm Password** fields. Passwords must be at least eight characters long and are not case-sensitive. Click **Create Your Account.**

Step 1 of 3: Create an Account

Already have an account? Click here

Sign up with your email address

First Name (Required)

Last Name (Required)

Email (Required)

Mobile (Required)

☑ Send me texts from this site

Address (Required)

Address Line 2

City (Required)

Select a State

Zip Code (Required)

Date of Birth: mm/dd/yyyy

United States

Password (Required)

Confirm Password (Required)

We use email to keep you informed of important confirmations, updates, changes, and reminders for your need responses. Make sure you get these messages by selecting yes to receive emails from this site. Update your communication preferences in your profile at any time! *

○ Yes ○ No

○ I have read and agree to Privacy Policy. *

CREATE YOUR ACCOUNT

3. Next, answer two additional questions about whether this is your first year of volunteering, and how you heard about VITA.

4. For the last step, please indicate your volunteer interests. Most likely you will click "Tax Preparer." Once you have selected your interests, click the button to **Continue**. You will be taken to your dashboard.

Inclement Weather and Emergency Closures

The Cooperative Ministry and its VITA Sites may close due to inclement weather or emergencies on days other than regularly scheduled holidays. Closures are guided by state, county, or facility officials. Should closures occur, Program staff will notify affected volunteers through phone, text message or email with as much lead time as possible. Since our VITA sites are in several counties, it is imperative that volunteers also check in with their Site Coordinator or Program staff if any doubt exists about how inclement weather is affecting their specific site.

Computer User's Policy

Volunteers are provided access to The Cooperative Ministry's network, other host facility and computer equipment to assist them in executing the VITA Program. The computer network (both LAN and Wi-Fi) is the exclusive property of The Cooperative Ministry and are to be used for legitimate business purposes. All users have a responsibility to use The Cooperative Ministry's computer resources in a professional, lawful, and ethical manner. Abuse of the network and/or equipment may result in disciplinary action, including possible termination as a volunteer, and civil and/or criminal liability.

While the computer network, desktop and laptop computers are expected to be used primarily for business purposes, occasional, limited, and appropriate personal use of these resources is permitted if such use does not interfere with the user's or any other volunteer's work; does not interfere or delay service to our clients; or, have an adverse effect on the computers or network's performance.

The Cooperative Ministry understands that some volunteers may maintain accounts on social media websites. Volunteers who use social media must ensure that their use of social media does not negatively affect the VITA site, fellow volunteers, or clients. Volunteers should use only their own personal devices to access social media.

Managing Difficult Clients

Whenever possible, a volunteer should talk the client out of his/her inappropriate actions. If after repeated attempts, this fails, seek assistance from the Site Coordinator or Program staff (if on site). At all times, another volunteer or staff member should be enlisted to serve as a witness. If the client acts in a belligerent or threatening manner, contact 911. Volunteers have the right to refuse service to clients that are quarrelsome or obviously untruthful.

VITA Program General Policies

VITA Income Limits

In accordance with the IRS VITA Program Rules and Regulations, **individuals and families who generally make $69,000 or less** qualify for VITA services at no cost. In general, if a worker is eligible for the Earned Income Tax Credit (EITC) or Child Tax Credit (CTC), they can have their returns prepared and filed at a VITA site. Ninety percent of returns prepared must be for low-income members of our community. Exceptions to the income limit can be granted by the Site Coordinator or the Director, VITA Program.

Volunteer Responsibilities

As a VITA program volunteer, you have a responsibility to provide quality service and to uphold the ethical standards of the program. When you begin as a volunteer, you will sign the Volunteer Standards of Conduct Agreement, stating that you will adhere to these standards:

- Follow the Quality Site Requirements. These will be covered in your training.
- Do not accept payment, solicit donations, or accept refund payments for federal or state tax return preparation from taxpayers.
- Never solicit business from taxpayers you assist or use the knowledge gained about a taxpayer for any direct or indirect personal benefit.
- Never knowingly prepare false returns. It is imperative that volunteers correctly apply the tax laws to the taxpayer's situation. While a volunteer may be tempted to bend the law to help taxpayers, doing so is fraudulent and unethical.
- Never engage in criminal, infamous, dishonest, notoriously disgraceful conduct, or any other conduct deemed to have a negative effect on The Cooperative Ministry, the VITA program, or the IRS.
- Treat all taxpayers in a professional, courteous, and respectful manner.

Due Diligence

All volunteers will practice due diligence, meaning that you will do your part to ensure the information on the tax returns you prepare, or review is correct and complete. Doing your part includes:

- Confirming a taxpayer's (and spouse, if applicable) identity.
- Providing top-quality service by helping taxpayers understand and meet their tax responsibilities.
- Making sure that facts presented by the taxpayer paint a reasonable picture.

- Question any unusual, inconsistent, or incomplete items.
- If you are unsure about a deduction or credit, try to research the answer, or ask another certified volunteer for assistance.
- Remind taxpayers that when they sign Form 8879, IRS e-file Signature Authorization (or their paper return), they are stating under penalties of perjury that the return is accurate to the best of their knowledge.

Generally, you can rely on good faith for taxpayer information without requiring documentation as verification. However, exercise caution when taxpayers want to claim a refundable credit or a large deduction without substantiating documentation (i.e., business expenses that offset most income, additional education expenses not shown on Form 1098, or large miscellaneous expenses such as charitable contributions or medical expenses). Taxpayers should also be reminded that they are responsible for providing supporting evidence in the event the IRS, or state Department of Revenue, audits their return.

Volunteer Training and Certification

All volunteers must complete certifications annually before volunteering at a tax site. The Cooperative Ministry provides in-person and virtual training to prepare volunteers for certification. Training and testing dates are scheduled for December and January and provide several opportunities for classroom or virtual instruction. The schedule of training will normally be posted to our Volunteer Center portal (https://coopmin.galaxydigital.com/) in November. Volunteers can reserve their training slot through the portal.

Depending on a volunteer's experience level, training and certification takes between four to twelve hours to complete. Some volunteers prefer to train at their own pace using training material found on-line. Once a volunteer completes certification, he/she must sign and submit to program staff a Volunteer Standards of Conduct form (Form 13615) which records the certifications completed and affirms that the volunteer will comply with program requirements and uphold the highest ethical standards.

The recommended training path is shown in the table below.

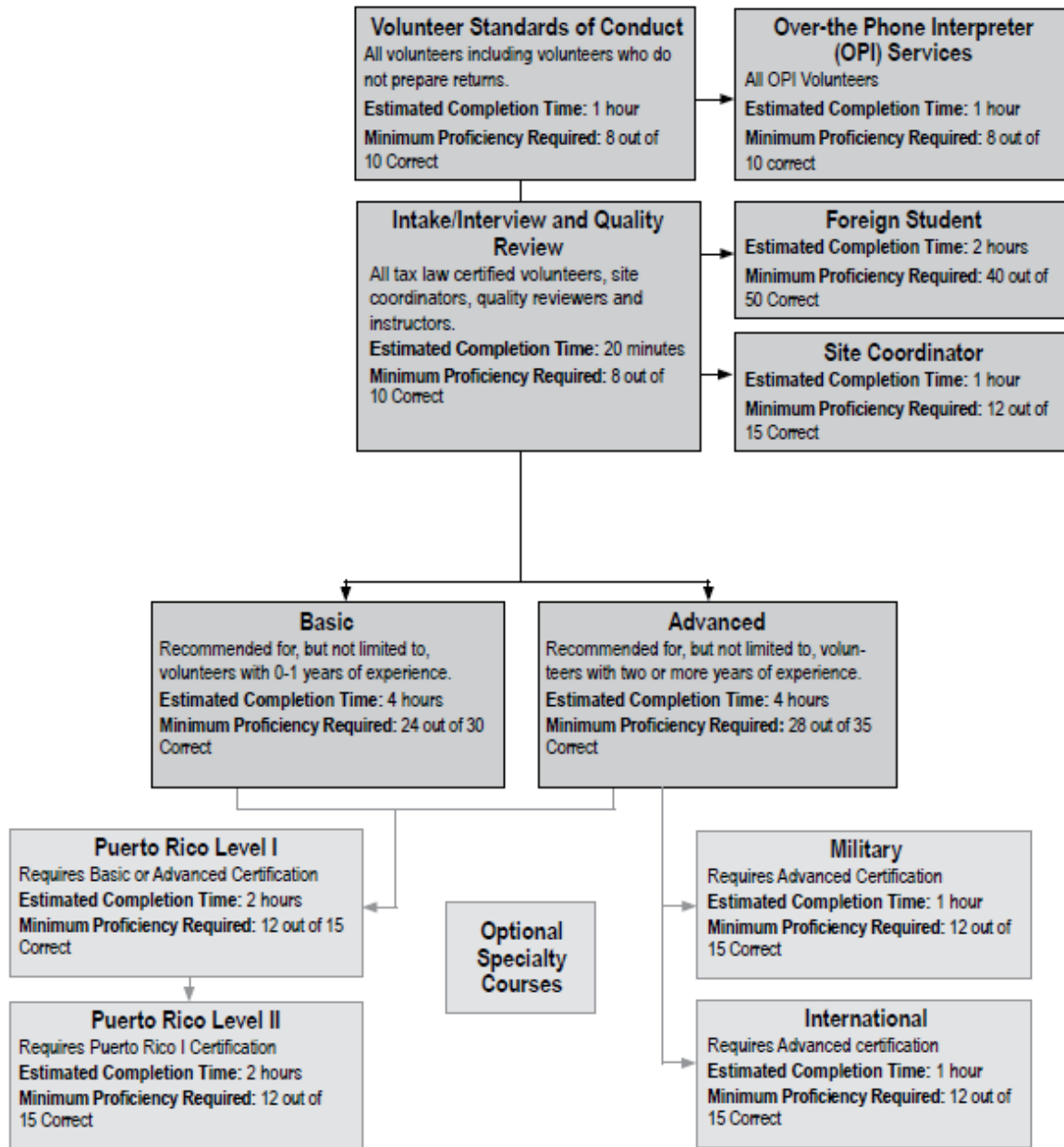| TOPIC	SUMMARY	LENGTH	NEW VOLUNTEER	RETURNING VOLUNTEER
Orientation	Introduction to The Cooperative Ministry and VITA. Volunteers certify on the first two required tests	2-3 hours	Required	Optional (it's a good refresher!)
Intake	Discussion about the intake form and the intake process	1.5 hours	Required	Optional
Tax Fundamentals	Basic tax information, and hands-on intro to TaxSlayer software	2-3 hours	Required	Recommended
Exam Certification	Overview & explanation of topics for exams. Certification exams can be taken in a group setting.	2-3 hours	Required	Required
Best Practices	Examples of common entry items and best practices for processing. Includes South Carolina specific issues/items. Time left over to address any exam questions.	2-3 hours	Highly recommended	Highly recommended

The steps of certifications are:
1. Volunteer Standards of Conduct (VSOC). This test is for all volunteers, including volunteers who do not prepare returns, and covers ethical and policy issues.
2. Intake / Interview and Quality Review (IIQR). This test is for all volunteer tax preparers, quality reviewers, site coordinators, and instructors. This training covers how to conduct an accurate and consistent client intake and interview, and quality review of a prepared tax return.
3. Tax Law and use of return preparation software. Tax law certification can be completed at the basic or advanced level, based on the volunteer's background, experience level and desire. Returning volunteers (one or more seasons) are encouraged to certify to the Advanced level. Additional training and certification are available in specialty areas, such as international, Puerto Rico, and military.

The Figure on the next page depicts the flow path for volunteer certification.[3]

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[3] Publication 6744, Revision 10-2025 VITA/TCE Volunteer Assistor's Test/Retest, 2025 Returns, p. 4

Certification Tests

Volunteer Standards of Conduct
All volunteers including volunteers who do not prepare returns.
Estimated Completion Time: 1 hour
Minimum Proficiency Required: 8 out of 10 Correct

Over-the Phone Interpreter (OPI) Services
All OPI Volunteers
Estimated Completion Time: 1 hour
Minimum Proficiency Required: 8 out of 10 correct

Intake/Interview and Quality Review
All tax law certified volunteers, site coordinators, quality reviewers and instructors.
Estimated Completion Time: 20 minutes
Minimum Proficiency Required: 8 out of 10 Correct

Foreign Student
Estimated Completion Time: 2 hours
Minimum Proficiency Required: 40 out of 50 Correct

Site Coordinator
Estimated Completion Time: 1 hour
Minimum Proficiency Required: 12 out of 15 Correct

Basic
Recommended for, but not limited to, volunteers with 0-1 years of experience.
Estimated Completion Time: 4 hours
Minimum Proficiency Required: 24 out of 30 Correct

Advanced
Recommended for, but not limited to, volunteers with two or more years of experience.
Estimated Completion Time: 4 hours
Minimum Proficiency Required: 28 out of 35 Correct

Puerto Rico Level I
Requires Basic or Advanced Certification
Estimated Completion Time: 2 hours
Minimum Proficiency Required: 12 out of 15 Correct

Optional Specialty Courses

Military
Requires Advanced Certification
Estimated Completion Time: 1 hour
Minimum Proficiency Required: 12 out of 15 Correct

Puerto Rico Level II
Requires Puerto Rico I Certification
Estimated Completion Time: 2 hours
Minimum Proficiency Required: 12 out of 15 Correct

International
Requires Advanced certification
Estimated Completion Time: 1 hour
Minimum Proficiency Required: 12 out of 15 Correct

Volunteer Identification

Volunteers are required to wear VITA Identification Name Badges when working at a VITA tax site. Volunteers who work at The Cooperative Ministry's main office location will also be issued a key card to gain access through secure doors. Please do not take these key cards with you. These will be hung back on the VITA coordinator's door at the end of each day.

The name badges display the volunteers' first name and last initial and are provided to each volunteer after successful completion of all required certifications. It will be worn around the neck using the provided lanyard.

Privacy and Confidentiality

All volunteers shall abide by general privacy and confidentiality principles:

- Information gained from the tax preparation process is to be kept confidential.
- Volunteers must protect physical and electronic data gathered for tax return preparation both during and after filing season.
- Volunteers using or disclosing taxpayer data for purposes other than current, prior, or subsequent year tax return preparation must secure the taxpayer's consent to use or disclose their data.
- Volunteers must delete taxpayer information stored locally on all computers (whether they are personally owned, The Cooperative Ministry or IRS owned) immediately after the return is successfully e-filed.

Verification of Taxpayer Identification

To prevent identity theft and tax fraud, volunteers shall validate taxpayers' identities and identification numbers prior to preparing the tax return and/or providing the taxpayer with a copy of their return.

When preparing tax returns, only information that is necessary and relevant should be requested. Information such as name, address, SSN, birth dates, marital status, bank account information for direct deposit and other basic information is necessary to prepare the return. The taxpayer entrusts personal information to the volunteer with the confidence that it will not be shared or used in any unauthorized manner. Documents that are relevant to ensure identity and accuracy include:

- An original photo identification (ID) such as valid driver's license (U.S.), employer ID, school ID, state ID (U.S.), Military ID, national ID, visa, or passport. However, judgment should be used to accept any other valid form of identification. If a taxpayer cannot substantiate a taxpayer's identity, or if the volunteer is uncomfortable accepting the items presented as proof of identity, the taxpayer should be advised to return with an acceptable form of identification.

- Social Security or Individual Taxpayer Identification Number (ITIN) card. Taxpayers should provide original or copies (paper or electronic) of social security cards or an acceptable substitute such as a letter from the Social Security Administration (SSA), Form SSA-1099, a Medicare card that includes the letter "A" after the SSN, and/or any other verification issued from the SSA. SSA verification documents with a truncated SSN (such as ***-**-1234) can be used as acceptable documents at the Site Coordinator's discretion. For taxpayers or dependents who do not qualify for an SSN, the volunteer must review an IRS-issued ITIN card or letter or assist with applying for an ITIN.[4] The mismatch of names and SSN or ITIN information is one of the top reasons for delays in processing electronic tax returns.

The Site Coordinator has the discretion to provide an exception to either requirement for taxpayers **known to the site**. The definition of "known to the site" includes a taxpayer that frequently visits the same site every year for tax return preparation and is known to the Site Coordinator and the volunteers at the site. Only the Site Coordinator can approve exceptions.

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[4] The volunteer must be certified as a Certified Acceptance Agent (CAA) to assist in the application for an ITIN.

Appendices

A - Certification and Training Tips

This appendix is designed to make the study and certification process a little easier for you. All volunteers must be certified by passing an IRS OPEN BOOK test before they can prepare tax returns. You can complete the test on your own, or during scheduled test dates in January as the last part of the classroom training. You can use any material available to help you pass the test (except someone else taking it for you.)

Training material, certification tests and a practice lab are found at the VITA/TCE Central website: https://linklearncertification.com. Each certification test is immediately graded and 80% is the passing score. You are allowed one re-test. You can digitally sign the certification sheet or, print it and manually sign. Your certifications are required to be kept on file at The Cooperative Ministry and at your volunteer site.

Training Packet. Three essential IRS publications are available for your training and certification. In an ideal world The Cooperative Ministry would have enough funding to mass-produce the material the IRS sends us, but the IRS continues to digitize more and more training material each year, and The Cooperative Ministry's resources cannot keep up. The primary training material consists of:

- Publication 4491, VITA/TCE Training Guide. Available in digital format only. This is a self-study guide with exercises and answers to help you grasp concepts.
- Publication 4012, Volunteer Resource Guide. Available in digital and limited print quantities. **This is your tax volunteer bible**. All volunteers should become familiar with this guide during training and certifying and use it regularly at a tax site. It is the resource to use both during testing and in preparing returns.
- Form 6744, Volunteer Assistor's Test/Retest. This publication contains the test questions. Most volunteers work through the certification tests using Pub 6744 with a pencil, then transfer their answers to the on-line test in Link and Learn for immediate grading.

Tips on Certification.

- Read each question carefully. They are not trick questions, but some have a nuance to them to replicate situations you'll encounter with real clients.
- For problem-type portions of the test – LOOK at the question BEFORE you complete the return in the Practice Lab (see below). In many cases you will only need to partially complete the return for the answer.
- Use all the resources available to include the Practice Lab and even www.irs.gov.
- Remember that each certification test is un-timed and open book!

Classroom Training Tips (whether in-person or virtual).

- Prepare for the class by reviewing parts 1 through 8 in the Pub 4491. Become familiar with the main topics in these sections. You do not need to complete all problems, but you could note questions you may have for the instructors.
- Have available the three main training resources described above.
- Returning volunteers may take the test during the classes, but questions will not be answered except during breaks or during the certification exams.
- If you are using your personal laptop or computer, use Chrome as your browser and download Adobe Reader to be able to view pdf documents.

Steps to Complete Your Certification(s)

Step 1: Create an account on Link and Learn Taxes, https://www.linklearncertification.com/. See Appendix B for instructions. Once your account is created, or you re-logged in as a returning volunteer, your home page will look like this:

Step 2: From your home page, select **Take certification test**.

Step 3: Click either the Basic or Advanced Track. *We recommend the Advanced track*. You will take three certifications in succession.
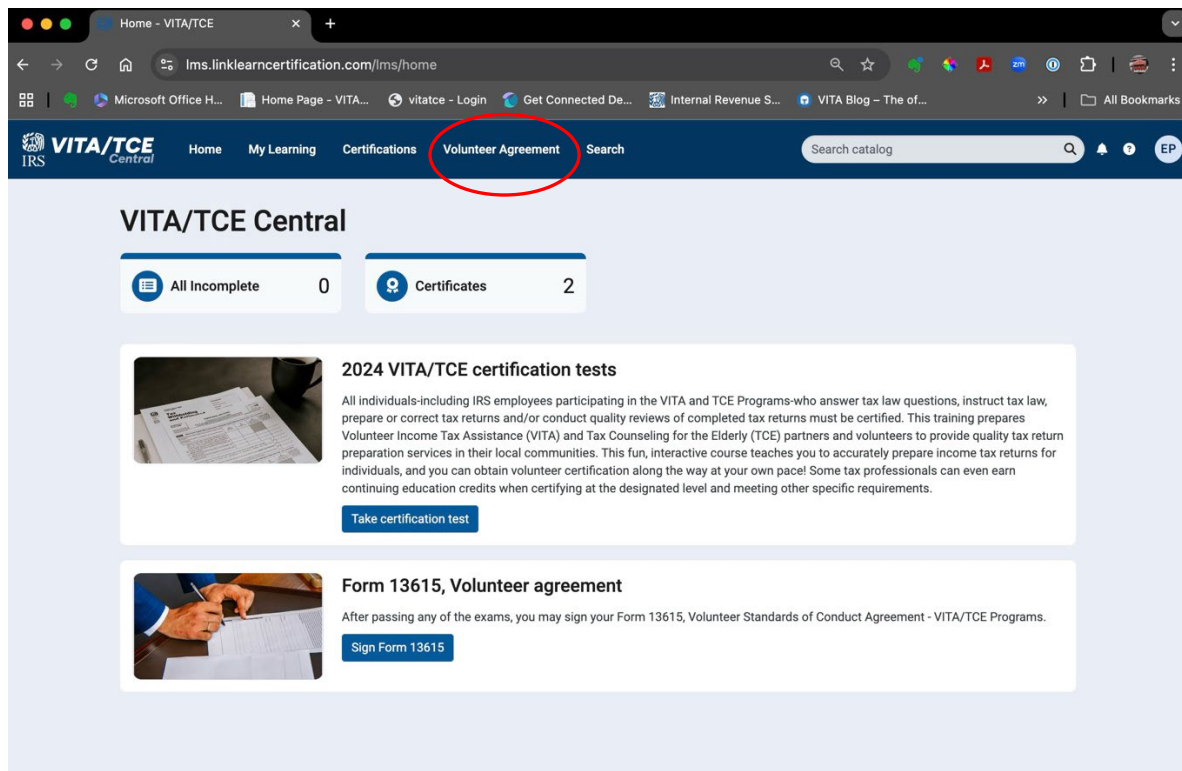

- The Volunteer Standards of Conduct (VSOC) Exam is required for ALL volunteers and a prerequisite for all other courses. Review the VSOC training (Publication 4961) found under "Quick Links" on the VITA/TCE Central home page. If you do not pass this exam after the second attempt, you may not proceed to any other exams.
- All tax preparers, Quality Reviewers, Instructors, and Site Coordinators must also pass the Intake/Interview and Quality Review test. First review the Intake/Interview and Quality Review Training course located under "Quick Links" on the VITA/TCE Central portal page. Then, log in to the test center and click on the link for the Intake/Interview and Quality Review Exam.
- It is not possible to take any of the other exams without first passing both the VSOC exam and the Intake/Interview and Quality Review exam.

Step 4: Taking VITA Certification Tests

- Volunteers preparing tax returns must pass either the Basic or Advanced certification test. Note that Basic and Advanced are stand-alone certifications; it is not required to take the Basic exam if you wish to certify in Advanced. The minimum score required to pass each certification test is 80%.
- Only volunteers who have passed the Advanced exam may choose to test for the Military and International certifications. You are allowed two attempts to take each exam.

Step 5: Signing your Volunteer Agreement, Form 13615

Once you have completed your certifications, you electronically sign your Volunteer Agreement from your Link and Learn homepage. Click the Volunteer Agreement Tab.

Form 13615, Volunteer Agreement should appear (see next page for a screen shot).

Form 13615, Volunteer Agreement

Certification information

Completed volunteer certification levels
Advanced - Test (2024) — Jan 18, 2025
Intake/Interview and Quality Review - Test (2024) — Nov 15, 2024
Site Coordinator - Test (2024) — Dec 3, 2024
Volunteer Standards of Conduct - Test (2024) — Nov 15, 2024

Continuing Education (CE) credits
No

Volunteer agreement

Please review and fill in the following details that will be used to populate fields in Form 13615

Training source *
Publication 4491

Sponsoring partner name/site name *
The Cooperative Ministry
Enter none if not yet affiliated with a partner or organization

Years you have volunteered *
6
Number of years volunteered (including this year)

Professional designation (for Circular 230 only)
--Select--

Volunteer Position(s)
☑ VITA Volunteer
☐ TCE - AARP Volunteer
☐ TCE - Other Volunteer
☐ VITA - Military Volunteer
☐ IRS Employee - SPEC
☐ IRS Employee - Volunteer
☐ IRS Employee - Other
☐ IRS SPEC Territory Manager
☐ Federal Employee non-IRS employee
☐ Foreign Student Site Volunteer
☑ Site Coordinator
☐ SPEC OPI Volunteer
☑ Volunteer Instructor
☐ Other
☐ I do not plan to volunteer in the VITA/TCE Program

☐ I agree to sign form 13615 Volunteer Agreement electronically
Sign Form 13615

Complete the appropriate fields (See ⭐ in screen shot above):

- Sponsoring Partner is "The Cooperative Ministry."
- Enter the years you have volunteered.
- Leave Professional Designation blank unless you are Circular 230 tax professional.
- Check the box next to "*I agree to sign form 13615 Volunteer Agreement electronically*."
- Click **Sign Form 13615.**

Next, click **Download signed form**. Return your signed form to The Cooperative Ministry via email to VITA@coopmin.org.

Form 13615 must be signed and dated by The Cooperative Ministry, Site Coordinator, or your instructor verifying your identity and that you have completed the required training and certification prior to working at a site. Your Volunteer Agreement is required to be on file at every VITA site at which you volunteer.

Both these resources require log-in credentials that you will create. Link and Learn is the testing and certification portal, and the Practice Lab is the training environment for the TaxSlayer software.

LINK AND LEARN.

1. Go to https://linklearncertification.com/ and click **Create Account** if you are a new volunteer**.**

Returning volunteers enter your username and click forgot password.

Returning volunteers may need to update your profile.

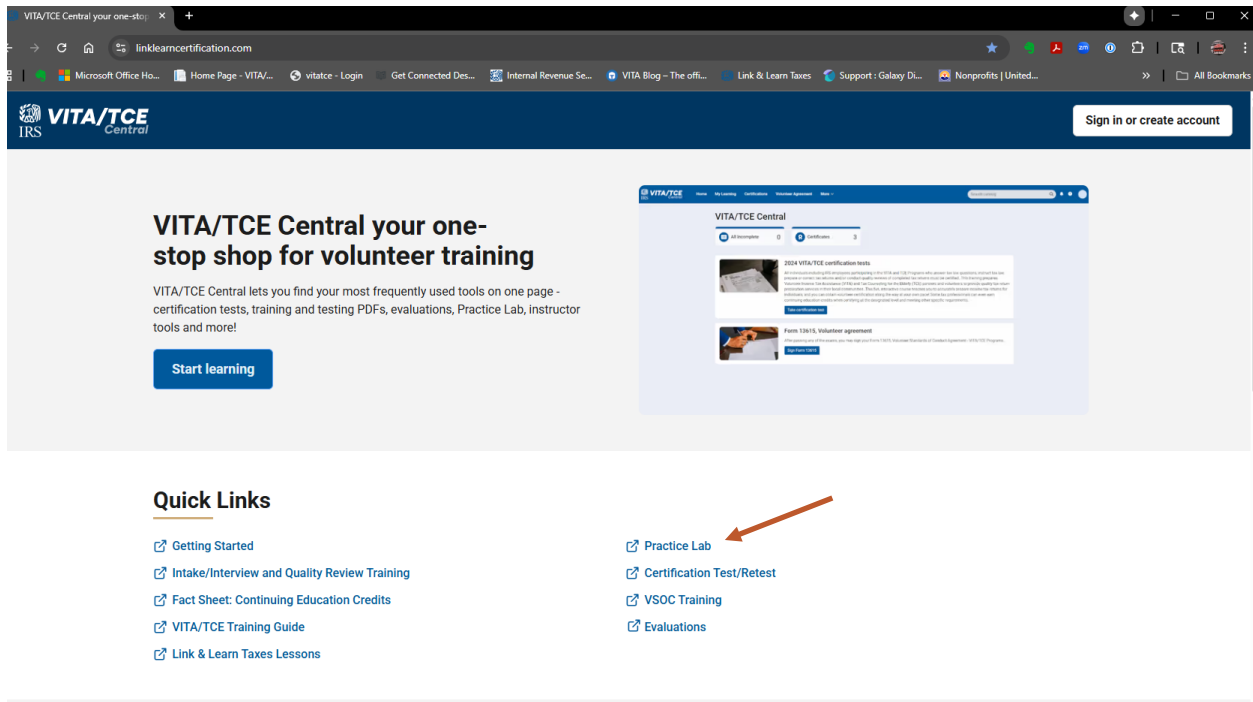2. Complete the required fields (marked by the asterisk) to create your account.

- **Training Source** is "Link and Learn Taxes (e-learning)".
- One account per email address.
- Passwords are case sensitive.

3. *WRITE DOWN YOUR USERNAME AND PASSWORD!*

PRACTICE LAB.

The Practice Lab is the training environment for the tax software we use in the VITA program. It looks and runs just like the live version of TaxSlayer. Note the link for Practice Lab under Quick Links at the bottom of the home page.
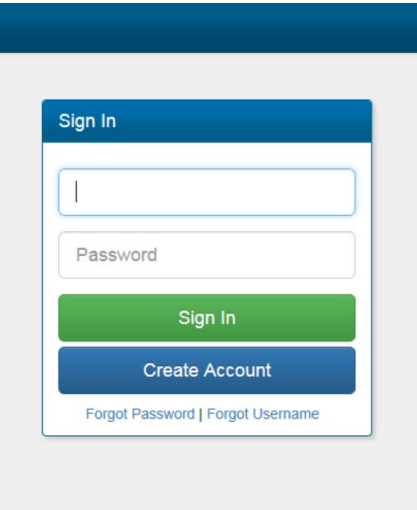
1. Click **Practice Lab**.

2. Enter **TRAINPROWEB** on this screen as the universal password. This screen always appears first, whether you are a returning or new volunteer.

TRAINPROWEB

Access Link & Learn Taxes

Hello,

Welcome to the Electronic Tax Software Practice Lab for VITA/TCE volunteers. When you enter this site, you will be able to prepare tax returns to practice what you just learned in Link & Learn Taxes. We recommend that you use the problems and exercises contained in Publication 4491 W, VITA/TCE Workbook, Comprehensive Problems and Practice Exercises. These problems and exercises were specifically designed to cover the types of tax returns that VITA/TCE volunteers encounter at their volunteer sites.

To access the practice lab enter below the password you received from the IRS or your site coordinator. If you do not know the password please contact your site coordinator or local IRS Relationship Manager.

If you are not currently a VITA/TCE volunteer and would like to become a volunteer, please click here to get started: https://www.irs.gov/Individuals/IRS-Tax-Volunteers. Your information will be forwarded to sponsoring partners in your area for further contact. You will be contacted within 2 weeks after you have submitted your information.

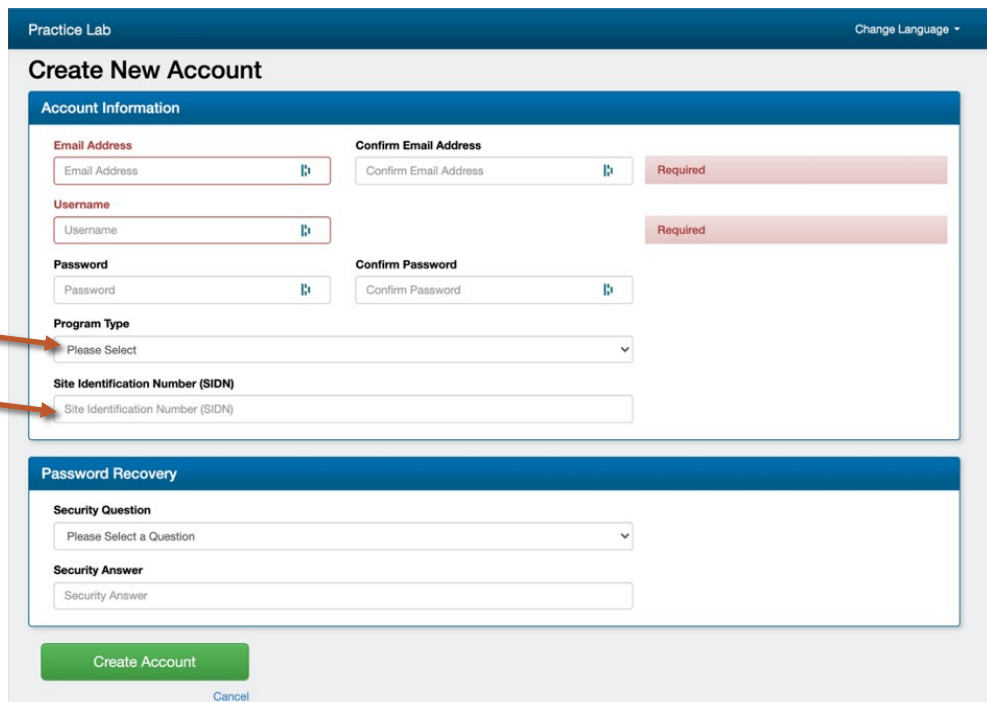Enter Password   Login

3. *New Volunteers click* **Create Account.**

Returning volunteers can use previously established username and password. Or click **Forgot Password or Forgot Username.**

4. Enter required account information and password recovery question:

Select **VITA**

Leave Blank

The Practice Lab also contains training videos and resource material that you can use at any time to augment your training or refresh your memory on certain tax preparation topics.

The Cooperative Ministry Volunteer Center: https://coopmin.galaxydigital.com/
Site Schedules, checking in and out of volunteer sites, orientation and training information, FAQ's, volunteer communication.

The Cooperative Ministry Web Site: http://coopmin.org
Our organizational webpage

VITA Google Drive folder: https://bit.ly/VITAtrng
Volunteer reference materials. One-stop site for references that is updated with current tax information in January of each year.

VITA/TCE Central Portal Page. https://www.linklearncertification.com/
Your most frequently used tools on one page—certification tests, training and testing PDFs, evaluations, Practice Lab.

TaxSlayer Software: https://vita.taxslayerpro.com/ProAvalon/
This is where you prepare tax returns. Once you certify and signup to volunteer at a specific site, your Site Coordinator will assign you a User ID. Returning volunteers will use their previously established User ID for the site.

Internal Revenue Service: https://www.irs.gov/
Instructions, tax publications and all sorts of information and guidance.

Phone Number for clients to contact Internal Revenue Service to make physical appointment:
803-312-7900; https://www.irs.gov/help/contact-your-local-irs-office

Taxpayer Advocate Service (TAS): https://www.irs.gov/advocate/local-taxpayer-advocate
    1835 Assembly St., Room 466, MDP 03, Columbia, SC 29201
    803-312-7901, toll-free 1-877-777-4778
Form 911, Request for Taxpayer Advocate Service Assistance: https://www.irs.gov/pub/irs-pdf/f911.pdf

South Carolina Department of Revenue: https://dor.sc.gov/
1-844-898-8542, Option 1