



Frequently Asked Questions For Virtual Volunteering

Q: What is Filing for Freedom?

A: Filing for Freedom brings the tax and legal communities together to provide free tax preparation services for military personnel and first responders. Planning is well underway for the 2022 tax filing season in 2023. We appreciate the support of many professional affiliations, including numerous state CPA societies, state and local bar associations, the Pro Bono sections of the American Bar and Federal Bar, and government agencies including the Department of Defense and the Internal Revenue Service. However, the program's success depends on strong, dependable volunteers.

Q: What type of volunteers are needed?

A: **GREETERS:** welcome taxpayers and review information for completeness and scope.
PREPARERS: provide tax return preparation services.
REVIEWERS: review prepared tax returns and ensure quality service.

Q: I have not previously participated as a volunteer with Filing for Freedom, and I do not deal with individual tax issues in my practice – is this still something I can do?

A: Yes! Filing for Freedom volunteers use the IRS's Link & Learn (www.linklearncertification.com/d) online program to train and certify in current and relevant areas of taxation, so you can learn at your own pace at times that work for you. The focus is on straight-forward returns.

Q: What is the time commitment for virtual volunteers?

A: The minimum volunteer time commits are in two-hour increments on Thursdays, Fridays and Saturdays in February and March. Generally, people choose to volunteer for half



days or for numerous two-hour windows as best suits them. You can sign up for one or more days, depending on your schedule. Once registered as a volunteer, you will be provided access to the IRS training materials. Volunteers can expect to spend at least one hour going through the online volunteer training module on Link & Learn (at www.linklearncertification.com/d) and then passing the required certification tests.

Q: I'm registered...Now what?

A: You will receive a welcome email containing information and links to the training and certification modules that must be completed before volunteering. **Please note, your certifications must be completed at least three days before your volunteer date in order for us to verify your completion with the IRS.**

Q: What are the required training and certification tests that must be passed for each type of volunteer on the Link & Learn site?

A: GREETERS:

1. **Volunteer Standards of Conduct (Ethics) Exam** (no CPE/CE credit)
2. **Intake/Interview and Quality Review Exam** (no CPE/CE credit)

PREPARERS & REVIEWERS:

1. **Volunteer Standards of Conduct (Ethics) Exam** (no CPE/CE credit)
2. **Intake/Interview and Quality Review Exam** (no CPE/CE credit)
3. One or more of the following:
 - a. **Circular 230 Federal Tax Law Test** (no CPE/CE credit)
 - b. **Basic Exam** (no CPE/CE credit)
 - c. **Advanced Exam** (14 hours of CPE/CE credit after ten volunteer hours onsite)
 - d. **Military Exam** (18 hours of CPE/CE credit after ten volunteer hours onsite)



For a Preparer or Reviewer, the quickest path to certification is to take the Circular 230 Federal Tax Law Test in addition to the Volunteer Standards of Conduct Exam and Intake/Interview and Quality Review Exam.

Generally, none of the exams above have any prerequisites except for the Military Exam, which requires you to pass the Advanced Exam first.

Q: What IRS Training Materials should I review?

A: Depending on the certifications, you should review some or all of the IRS materials below:

- [Volunteer Resource Guide \(Pub. 4012\)](#)
- [Volunteer Tests \(Form 6744\)](#)
- [Volunteer Training Guide \(Pub. 4491\)](#)
- [Fact Sheet for Volunteer Training \(Pub. 5325\)](#)
- [Frequently Asked Questions for Link & Learn Certification Tests \(Pub 5379\)](#)
- [Getting Started Link & Learn Certification Tests \(Pub. 5378\)](#)
- [Intake Interview & Quality Review Training \(Pub. 5101\)](#)
- [Armed Forces Tax Guide \(Pub. 3\)](#)
- [Privacy, Confidentiality and Civil Right \(Pub. 4299\)](#)

Q: Where are the Filing for Freedom sites located?

A: Sites are at the following locations for 2023:

Region	Location	Dates
Georgia	Dobbins ARB	Feb 4-5, Mar 4-5, Apr 1-2
	Atlanta - At-Promise Centers	Feb 11-12, Mar 18-19
DC / Maryland / Virginia	Andrews AFB	Feb 9 – Apr 1 (Thurs-Sat)
	Fort Myer	Feb 9 – Apr 1 (Thurs-Sat)
Texas	Randolph AFB	Feb 9 – Apr 1 (Thurs-Sat)
Kentucky	Fort Knox	Feb 9 – Apr 1 (Thurs-Sat)
Louisiana	Fort Polk	Feb 9 – Apr 1 (Thurs-Sat)
Oklahoma	Fort Sill	Feb 9 – Apr 1 (Thurs-Sat)

You will be emailed site address location and instructions closer to your volunteer date.



Q: How do I schedule my volunteer hours?

A: To volunteer for a particular region location, please click on the appropriate link below and complete the registration form, indicating your preferred volunteer dates and times:

- *In-Person Volunteering:* [Dobbins Air Reserve Base & Atlanta Police \(GA\)](#)
- *In-Person and Virtual Volunteering:* [Joint Base Andrews \(MD\)](#)
- *Virtual Volunteering:* [Randolph AFB \(TX\), Ft Knox \(KY\), Ft Polk \(LA\), Ft. Sill \(OK\), Ft. Meyer \(VA\)](#)

Q: Do volunteers or partner firms have liability for preparing tax returns?

A: Volunteers are not considered paid preparers and, therefore, are not legally liable under federal law for the tax returns they prepare. Volunteers cannot accept payment of any kind from taxpayers for their volunteer services. Public Law 105-19, known as the Volunteer Protection Act of 1997, generally protects volunteers from liability for negligent acts they perform within the scope of their responsibilities in the organization for whom they volunteer. The Volunteer Protection Act is not written exclusively for the IRS or Filing for Freedom, but rather is a public law that relates to organizations that use volunteers to provide services.

Q: What tax forms do Filing for Freedom sites prepare?

A: Volunteers prepare IRS Form 1040 and related state returns using TaxSlayer online.

Q: What equipment will I need as a virtual volunteer?

A: You will need your own computer / laptop that has webcam and microphone capabilities as well as secure access to the internet. Filing For Freedom uses a Zoom platform for connecting volunteers with military taxpayers.



Q: How will I be given access to the TaxSlayer Online portal?

A: TaxSlayer Online may be accessed by going to <https://vita.taxslayerpro.com>. Please click on the box that says “Pro Online” at the top center of that webpage. You will see a screen that says, “Log in to Pro Web.” A day or two before you volunteer, you will be provided with your user ID and a temporary password. Once you log in, you will be asked to change your password to one of your choosing. Once complete, you can click on “Client Search” to look for your assigned taxpayer.

Q: What should I expect during my volunteer session?

A: **GREETERS:** As a Greeter you will review the forms and documents uploaded to the TaxSlayer Customer Portal by the taxpayer to ensure completeness and validity as well as confirm that the tax preparation involved falls within the scope of them being able to participate. If a taxpayer has a Sch K-1 from other investments or income from renting a house, etc., they will be out of scope for their tax return to be prepared with Filing for Freedom. Once documents are fully reviewed, you will commence a short Zoom session to ask questions in order to further verify their information. Once complete, you will either handoff the Zoom session to the Preparer to take over (if same day/time appointment) or confirm that they are ready for tax preparation and should show up at that later appointment (if on a different day/time).

PREPARERS: As a Preparer, you will prepare the federal and state tax returns for a taxpayer. You will briefly confirm with the Greeter or Filing for Freedom, any issues noted, review the uploaded information in the TaxSlayer Customer Portal, and ask the taxpayer questions. Both the taxpayer and Preparer can pause the video portion while the Preparer prepares the tax return, however, the taxpayer must remain available for any questions that arise. If you want to speed the process up and begin to prepare the



taxpayer's tax return prior to the appointment, then you are allowed to do so. Once the tax return has been fully completed, you will either handoff the Zoom session to the Reviewer to take over (if same day/time appointment) or confirm that they are ready for review and should show up at that later appointment (if on a different day/time).

REVIEWERS: As a Reviewer, you will review the tax returns that have been prepared by the Preparer. You will briefly confirm with the Preparer, or Filing for Freedom, any issues noted, review the uploaded information in the TaxSlayer Customer Portal, and ask the taxpayer questions. Both the taxpayer and Reviewer can pause the video portion while the Reviewer reviews the tax return, however, the taxpayer must remain available for any questions that arise. If you want to speed the process up and begin to review the taxpayer's tax return prior to the appointment (if already prepared), then you are allowed to do so. Once fully completed, you will ask the taxpayer to electronically sign their tax return in the Customer Portal and thank them for their service. You should send them their return to sign from TaxSlayer. You may inform the taxpayer that their tax return will be submitted and processed shortly and that a copy of their tax return will be available in the TaxSlayer portal and a link will be sent to them for them to download. If they choose to paper file, their return will not be electronically filed, and they will need to then print, sign, and file their return accordingly. Lastly, if their submission is rejected for any reason, someone with Filing for Freedom will be in touch with them to address the issue.

Q: How do I access the Customer Portal once logged into TaxSlayer Pro Online?

A: Once you have logged in and gone to the taxpayer's tax return, click on the dropdown button next to the taxpayer's name at the top right of the screen. The click on "Scanned Documents" to see all documents uploaded by the taxpayer.



Q: How do I share signature documents in the Customer Portal for the taxpayer to sign their tax return?

A: See detailed response at <https://zen-vita.zendesk.com/hc/en-us/articles/4412467058459>

Q: What if a taxpayer asks for my contact information to get back with me on a question?

A: You should not provide your contact information to any taxpayer and ensure that all communication goes only through Filing for Freedom.

Q: What if I have questions during the process?

A: If it is a question concerning TaxSlayer, please use the online chat feature within TaxSlayer Pro to communicate with someone from the TaxSlayer team who should be able to assist you. If they cannot help you or the matter relates to something outside of the software, please contact Filing for Freedom personnel:

Robyn McClung: 888-800-1031/ rmclung@FilingforFreedom.org

James Freeman: 678-481-3359 / jfreeman@FilingforFreedom.org

Chuck Hodges: 404-581-8636 / cehodges@jonesday.com

Q: What if I cannot make it to my confirmed, scheduled volunteer time?

A: Please contact Filing for Freedom personnel and let them know as soon as possible.

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