



In-Person Volunteering Frequently Asked Questions

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 2023 tax filing season in 2024. 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 such as you and others in the tax and legal community.

Q: What type of volunteers are needed?

A: **GREETERS:** review uploaded taxpayer information for completeness and scope.
PREPARERS / REVIEWERS: provide tax return preparation and review services.

Q: I have not previously participated in 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) online program to annually train and certify in relevant areas of taxation, so you can learn at your own pace at times that work for you. The focus is to provide services for military taxpayers with relatively straight-forward returns.

Q: What is the time commitment for volunteers?

A: You must be able to commit to full or half days on one or more of the in-person designated dates. Except for Sundays, which begin later, volunteer shifts are generally scheduled from 8:30 a.m. until 12:00 p.m. or from 12:00 p.m. until 4:00 p.m. You can sign up for half-



day or full-day shifts on 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](#) and then passing the required certification tests. You may also access the [TaxSlayer Practice Lab](#) using the following password to assist with your training: TRAINPROWEB. Once in the Practice Lab you will be able to create an account.

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

A: You will receive a welcome email containing information and links to the training (optional) and certification modules (mandatory) that must be completed every year before volunteering. **Please note, your certifications must be completed prior to being assigned any taxpayers. We also request that you send us a copy of your certificates.**

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

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: In-Person and virtual sites are in conjunction with the following locations for 2024:

Region	Location	Dates
Georgia	Dobbins ARB	Feb 3-4, Mar 2-3, Apr 6-7
	At-Youth Promise Center for Atlanta Police / Atlanta Fire	Feb 10-11, Mar 16-17
DC / Maryland / Virginia	Andrews AFB	Feb 14 – Apr 12
	Fort Myer	Feb 14 – Apr 12
Texas	Randolph AFB	Feb 14 – Apr 12
Kentucky	Fort Knox	Feb 14 – Apr 12
Louisiana	Fort Polk	Feb 14 – Apr 12
Oklahoma	Fort Sill	Feb 14 – Apr 12

In-person site address locations and instructions will be sent closer to your volunteer date.



Q: How do I schedule my volunteer hours?

A: To volunteer, please click on the appropriate link below and complete the registration form, indicating your preferred volunteer location (if any) and week:

- [*In-Person Volunteering:*](#)
- [*Virtual Volunteering:*](#)

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 tax returns they prepare while volunteering. 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. Please note that volunteers cannot solicit any business or accept payments of any kind from taxpayers for their volunteer services.

Q: What do I do when arriving at the site?

A: Please be on time and make your way to the tax return preparation site and the onsite coordinator will greet you upon arrival and provide further instructions.

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

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

Q: What should I bring to the site with me as a volunteer?

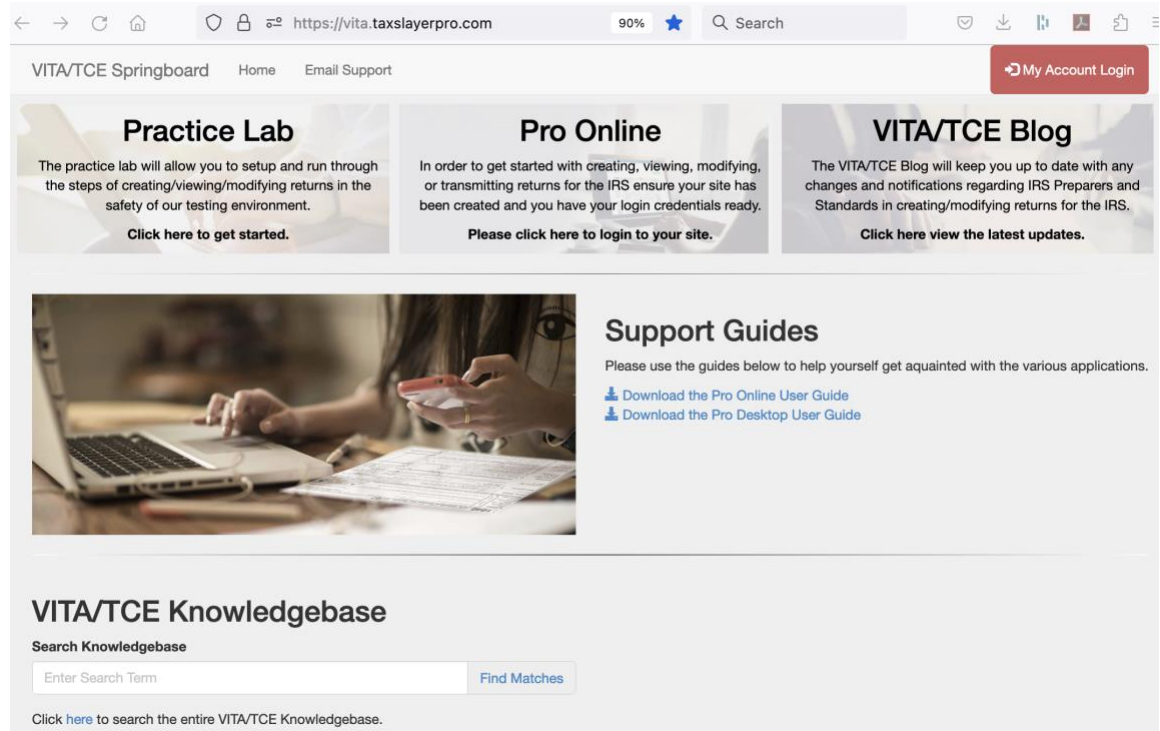
A: Please bring your driver's license / ID, as well as your computer/laptop and power cords. The site will have secure internet access, snacks, drinks, and lunch. To get onto the base,



you will need a copy of your driver's license to verify your date of birth submitted to us during your registration.

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 the webpage (see screenshot below). Do not click on the icon that says **“My Account Login”** at the top right on this page as that is a different system that you are not able to access.



You will then see a screen that says, **“Log in to Pro Web.”** A day or two before you volunteer, you will be provided with you 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.

A screenshot of the '2022 Tax Program' login page. On the left is a navigation menu with links for 'IRS website', 'IRS Mailing Addresses', and 'IRS Publications, Instructions, and Fill-In Forms'. The main content area is titled '2022 Tax Program' and contains a yellow warning box with text about authorized use of the TaxSlayer Pro Online system. Below this is a 'Log in to Pro Web' section with a prompt to enter a username and password. There are two input fields: one for 'Username' and one for 'Password'. A blue 'LOG IN' button is positioned below the fields. At the bottom, there are links for 'Forgot username' and 'Forgot password'.

Q: What should I expect during my volunteer session?

A: GREETERS: As a Greeter you will review the forms and documents provided 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 generally be out of scope for their tax return to be prepared with Filing for Freedom. Once documents are fully reviewed and questions have been asked and answered, you will transition the taxpayer to a Preparer.



PREPARERS: As a Preparer, you will prepare the federal and state tax returns for a taxpayer. You will briefly confirm any issues noted by the Greeter, review the information brought by the taxpayer, and ask the taxpayer questions throughout the tax return preparation process. Once the tax return has been fully completed, you will transition the taxpayer to a Reviewer.

Please be sure to scroll to the bottom of the last tab (Submission Page) in TaxSlayer and check the appropriate boxes for “Ready for Review” in each of the two places as shown in the screenshot below. Then “Save and Return” or “Save and Exit.”

Submission Page

Review the final details and transmit the return.



Return Status Tag(s)

Select the tags below to sort returns from within the client list based on the predefined criteria below.

<input type="checkbox"/> Ready for Review	<input type="checkbox"/> SPEC Oversight Review	<input type="checkbox"/> Ready for EFile
<input type="checkbox"/> Missing information	<input type="checkbox"/> Complete	<input type="checkbox"/> Out of Scope

[View all return tags](#)

Transmit Return

E-file the completed tax return

Select one:

<input type="checkbox"/> Mark tax return ready for review
<input type="checkbox"/> Mark tax return as complete

[BACK](#)

[SAVE & RETURN](#)

[SAVE & EXIT](#)



REVIEWERS: As a Reviewer, you will review the tax returns that have been prepared by the Preparer. You will briefly confirm with the Preparer any issues noted, review the information brought by the taxpayer, and ask the taxpayer questions throughout the process. Once fully completed, you will have the taxpayer(s) review and e-sign the return, then print it for their records and put all their documents and the signed tax return into an envelope for them. Please thank them for their service and inform them that their tax return will be submitted and processed shortly. Filing for Freedom does not keep any taxpayer information or documents.

Please be sure on the last page (Submission Page) to scroll to the bottom and uncheck the “Ready for Review” and then check the three boxes for “Complete” and “Ready to EFile” as shown in the screenshots below. Lastly, if their submission is rejected for any reason, someone with Filing for Freedom will be in touch with them to address the issue.

Submission Page

Review the final details and transmit the return.



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[BACK](#)

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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> and screen shots below. Click on “Send Document” to send to the Customer Portal. Once signed, the taxpayer’s signature will appear in the box below and on the tax return.

Submission Page

Review the final details and transmit the return.



TAXPAYER ELECTRONIC SIGNATURE [Edit Signature](#)

...

Print Tax Documents

Select document(s) to print

TAXPAYER COPY PRINT

PRINT

Share tax documents

Choose how to share tax documents with the client electronically

Receipt

[↓ DOWNLOAD \(CSV\)](#)

Invite to Customer Portal

Email **SEND INVITE**

Last sent:

Send tax return via Customer Portal

[SEND DOCUMENT](#)



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 volunteer 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 the lead Filing for Freedom personnel on-site.

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.

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

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

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