



## Virtual 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 as a volunteer with Filing for Freedom, and I do not regularly handle 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.linklearntaxescertification.com](http://www.linklearntaxescertification.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 straightforward returns.



**Q: What is the time commitment for virtual volunteers?**

A: While you are certainly able to volunteer for more, the requested minimum volunteer commitments are for at least five taxpayers for Greeters and at least three taxpayers for Preparers and Reviewers. On average Greeters spend about 15 to 20 minutes for each taxpayer's initial intake review, Preparers spend about 45 to 60 minutes for each taxpayer's initial tax return preparation, and Reviewers spend about 20 to 30 minutes for each taxpayer's tax return review and sign off. We ask that once you are assigned a taxpayer, that you work to complete that assignment within a one-week window at your convenience. You can sign up for multiple taxpayer returns during the season, 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 to volunteer...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 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: Virtual sites are in conjunction with the following bases 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

**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 tax forms do Filing for Freedom sites prepare?**

A: Volunteers prepare IRS Form 1040 and any 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.

**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.

A screenshot of the TaxSlayer Pro Online website. The browser address bar shows 'https://vita.taxslayerpro.com'. The page has a navigation bar with 'VITA/TCE Springboard', 'Home', 'Email Support', and a 'My Account Login' button. Below the navigation bar are three main sections: 'Practice Lab' with a description and a 'Click here to get started.' link; 'Pro Online' with a description and a 'Please click here to login to your site.' link; and 'VITA/TCE Blog' with a description and a 'Click here view the latest updates.' link. Below these sections is a 'Support Guides' section with a photo of a person working on a laptop and two links: 'Download the Pro Online User Guide' and 'Download the Pro Desktop User Guide'. At the bottom is a 'VITA/TCE Knowledgebase' section with a search bar and a 'Find Matches' button. A link at the bottom says 'Click here to search the entire VITA/TCE Knowledgebase.'



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.

**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. Then click on “Scanned Documents” to see all documents uploaded by the taxpayer. See screen shot below.

Scanned Documents

[+ Upload Documents](#) [+ Download All](#) [Close Window](#)

File name	File Size		
Form 13614-C (Signed).pdf	66 KB	<a href="#">Download</a>	<a href="#">Delete</a>
Form 14446 (Signed).pdf	301 KB	<a href="#">Download</a>	<a href="#">Delete</a>
Form W-2.pdf	372 KB	<a href="#">Download</a>	<a href="#">Delete</a>
SSN Cards & Drivers Licenses.pdf	3 MB	<a href="#">Download</a>	<a href="#">Delete</a>
Bank Account Check.pdf	3 MB	<a href="#">Download</a>	<a href="#">Delete</a>
Donations.pdf	146 KB	<a href="#">Download</a>	<a href="#">Delete</a>
2021 Form 1040 (FILED).pdf	169 KB	<a href="#">Download</a>	<a href="#">Delete</a>

[+ Upload Documents](#)



**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 taxpayers to ensure completeness and validity as well as confirm that the tax preparation involved for each return falls within the scope of the taxpayer 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. If you see a taxpayer is out of scope, please let Filing for Freedom know so they can inform the taxpayer. Once documents are fully reviewed, if necessary, you will provide a list of questions and outstanding information still required by the taxpayer. If the documents provided by the taxpayer are not complete, you will be notified once such additional documents have been uploaded so that you can finalize your review. Once complete, you will confirm that they are ready to move to the tax preparation stage.

**PREPARERS:** As a Preparer, you will prepare the federal and state tax returns for taxpayers. You will briefly confirm any issues noted by Filing for Freedom, review the uploaded information in the TaxSlayer Customer Portal, and prepare your list of any additional documentation and questions for the taxpayer that are needed for you to complete the tax return. You will send that list to Filing for Freedom who will communicate with the taxpayer. Filing for Freedom will forward the taxpayer's responses to you and notify you of any additional uploaded documents. Once the tax return has been fully completed, you will confirm that they are ready to move to the tax return review stage. 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 tax returns that have been prepared by Preparers. You will briefly confirm any issues noted by Filing for Freedom, review the uploaded information in the TaxSlayer Customer Portal, and prepare your list of any additional documentation and questions for the taxpayer that are needed for you to complete your review of the tax return. You will send that list to Filing for Freedom who will communicate with the taxpayer. Filing for Freedom will forward the taxpayer's responses to you and notify you of any additional uploaded documents. Once the tax return has been fully completed, you will confirm that they are ready to move to the filing stage. 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.



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[View all return tags](#)

### Transmit Return

E-file the completed tax return

Select one:

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

[BACK](#)

[SAVE & RETURN](#)

[SAVE & EXIT](#)

In the filing stage, Reviewers will upload the finalized tax return to the taxpayer's Customer Portal and alert Filing for Freedom that the taxpayer can now review and electronically sign their tax return. Once signed, their tax return will be submitted to and processed by the tax authorities. A copy of their tax return will be available in their Customer Portal for download by the taxpayer. 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. 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 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 Filing for Freedom personnel:

**Robyn McClung:** 888-800-1031 / [rmclung@FilingforFreedom.org](mailto:rmclung@FilingforFreedom.org)

**James Freeman:** 678-481-3359 / [jfreeman@FilingforFreedom.org](mailto:jfreeman@FilingforFreedom.org)

**Chuck Hodges:** 404-581-8636 / [cehodges@jonesday.com](mailto:cehodges@jonesday.com)

**Q: What if I can no longer volunteer after being assigned a taxpayer?**

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

**Robyn McClung:** 888-800-1031 / [rmclung@FilingforFreedom.org](mailto:rmclung@FilingforFreedom.org)

**James Freeman:** 678-481-3359 / [jfreeman@FilingforFreedom.org](mailto:jfreeman@FilingforFreedom.org)

**Chuck Hodges:** 404-581-8636 / [cehodges@jonesday.com](mailto:cehodges@jonesday.com)