

BROWARD TAX PRO (VITA) VOLUNTEER HANDBOOK TS 2026



Empowering Volunteers to Serve
with Excellence

Table of Contents

BROWARD TAX PRO (VITA) COALITION WELCOME LETTER..... 4

ABOUT VOLUNTEERING.....5

BROWARD TAX PRO (VITA)/TCE CERTIFICATION REQUIREMENTS FOR TAX SEASON 2026.....7

CERTIFICATION TESTS 2026.....8

IRS FORM 13615 & AFFIDAVIT OF GOOD MORAL CHARACTER.....9-15

BROWARD TAX PRO (VITA) VOLUNTEERING ONBOARDING PROCESS.....16

VOLUNTEERING ACROSS CULTURES – BUILDING BRIDGES.....19

VOLUNTEER RIGHTS.....20

VOLUNTEER RESPONSIBILITIES.....21

BROWARD TAX PRO (VITA) COALITION RIGHTS & RESPONSIBILITIES.....22

DRESS CODE, SEXUAL HARASSMENT.....23

EQUAL OPPORTUNITY, BROWARD TAX PRO (VITA) POLICY, VOLUNTEER BACKGROUND
SCREENING.....24

CONTACT INFORMATION.....25



BROWARD TAX PRO (VITA)

Welcome to the Broward Tax Pro BROWARD TAX PRO (VITA)Orientation!

We're thrilled to have you join our dedicated community of volunteers. The Volunteer Income Tax Assistance (BROWARD TAX PRO (VITA) program is an IRS-sponsored initiative that offers free tax help to individuals and families who generally earn \$75,000 or less, as well as to persons with disabilities and those with limited English proficiency. BROWARD TAX PRO (VITA) volunteers are trained and certified to ensure accurate, secure, and confidential tax preparation.

As a volunteer, you'll receive comprehensive training in both tax law and tax software, equipping you to confidently serve clients at strategically selected sites throughout the county during and beyond the tax season.

To support your journey, we've created this BROWARD TAX PRO (VITA) Volunteer Handbook, a practical and easy-to-use guide filled with essential information for both new and returning volunteers. Whether you're here to learn, lead, or lend a helping hand, this resource is designed to enhance your experience and empower your service.

This initiative is a collaborative effort led by several BROWARD TAX PRO (VITA) providers, Hispanic Unity of Florida and Community Access Center, in partnership with the IRS and HandsOn South Florida, our volunteer management partner. Together, we are united by a shared mission: to provide high-quality, free income tax preparation services to low- and moderate-income families across Broward County.

We deeply appreciate your commitment to making a difference. Your time, talent, and dedication are the heart of the BROWARD TAX PRO (VITA) program's continued success.

With gratitude,

The Broward Tax Pro BROWARD TAX PRO (VITA) Coalition Team

ABOUT VOLUNTEERING

Definition of Volunteerism

“Volunteering is an expression of the individual’s involvement in their community. Participation, trust, solidarity, and reciprocity—grounded in a shared understanding and a sense of common obligations—are mutually reinforcing values at the heart of governance and good citizenship.

[BROWARD TAX PRO \(VITA\) Program](#)

Volunteering is not a nostalgic relic of the past. It is our first line of defense against social atomization in a globalizing world. Today, more than ever before, caring and sharing are a necessity, not a charitable act.” — UNV (2000, November)

“No act of kindness, no matter how small, is ever wasted.” — Aesop

Volunteer Protection Act (VPA)

The Volunteer Protection Act of 1997 (Public Law 105-19) protects volunteers from liability for negligent acts committed while performing duties within the scope of their responsibilities for a nonprofit or governmental organization. This law is not exclusive to the IRS—it applies broadly to organizations that rely on volunteers to deliver services.

What Does the VPA Do?

The VPA promotes the interests of social service program beneficiaries and taxpayers and sustains the availability of programs, nonprofit organizations, and governmental entities that depend on volunteer contributions. It does this by providing certain protections from liability concerns for volunteers serving within the scope of the program

Limitations of Protection:

The VPA does **not** protect volunteers whose actions involve:

- Willful or criminal misconduct
- Gross negligence or reckless misconduct
- Conscious or flagrant indifference to the rights or safety of individuals harmed

Volunteers who follow the Volunteer Standards of Conduct are generally protected, but local and state laws still must be considered.

Who Qualifies as a Volunteer Under the VPA?

A “volunteer” is defined as an individual who:

- Performs services for a nonprofit or governmental entity (including roles such as director, officer, trustee, or direct service volunteer), and
- Receives no more than \$500 per year from the organization as:
 - Compensation (excluding reasonable reimbursements or allowances for expenses), or
 - Any other item of value in lieu of compensation

Even if someone does not meet the VPA’s definition of a volunteer, that person is still considered a volunteer under the BROWARD TAX PRO (VITA) Program. To ensure protection, those who do not fit this VPA volunteer definition should seek advice from their sponsoring organization’s attorneys to determine liability protection rights.

Requirements to Volunteer under Broward Tax Pro

- One must be legally authorized to work in the United States to volunteer with Broward Tax Pro. Proof of legal work authorization may be required.

- Must sign and submit a notarized Affidavit of Good Moral Character

BROWARD TAX PRO (VITA) CERTIFICATION REQUIREMENTS FOR TAX SEASON 2026

Program Vision

The mission of the Broward Tax Pro (BROWARD TAX PRO (VITA)) program is to assist eligible taxpayers in meeting their tax obligations by offering free tax return preparation. To establish the greatest degree of public trust, volunteers are required to maintain the highest standards of ethical conduct and provide quality service.

Required Certifications

1. Volunteer Standards of Conduct (VSC) Training

- All volunteers must complete the Volunteer Standards of Conduct (VSC) training and pass the certification test with a score of **80% or higher**.
 - The training covers six key standards and provides examples of ethical scenarios.
 - Available via Link & Learn Taxes and in Publication 4961 *Volunteer Standards of Conduct* Training – Ethics Training.
 - Form 6744 *Volunteer Assistors Test/Retest* contains only the test questions.
- **Obtaining VSC certification is required before any other certification or site work.**

2. Intake/Interview and Quality Review Training

- Publication 5101 outlines the correct process and use of Form 13614-C.
- The training course is available on Link & Learn Taxes and irs.gov.
- A printable certificate is available upon completion.
- Obtaining this certification is required **before** attempting to obtain tax law certifications.

3. Tax Law Training

All volunteers answering tax law questions, teaching tax law, preparing or correcting tax returns, and/or conducting quality reviews of completed tax returns must be IRS certified in tax law.

- A passing score of **80% or higher** is required for each certification module.
- Volunteers are allowed **two attempts** per course.

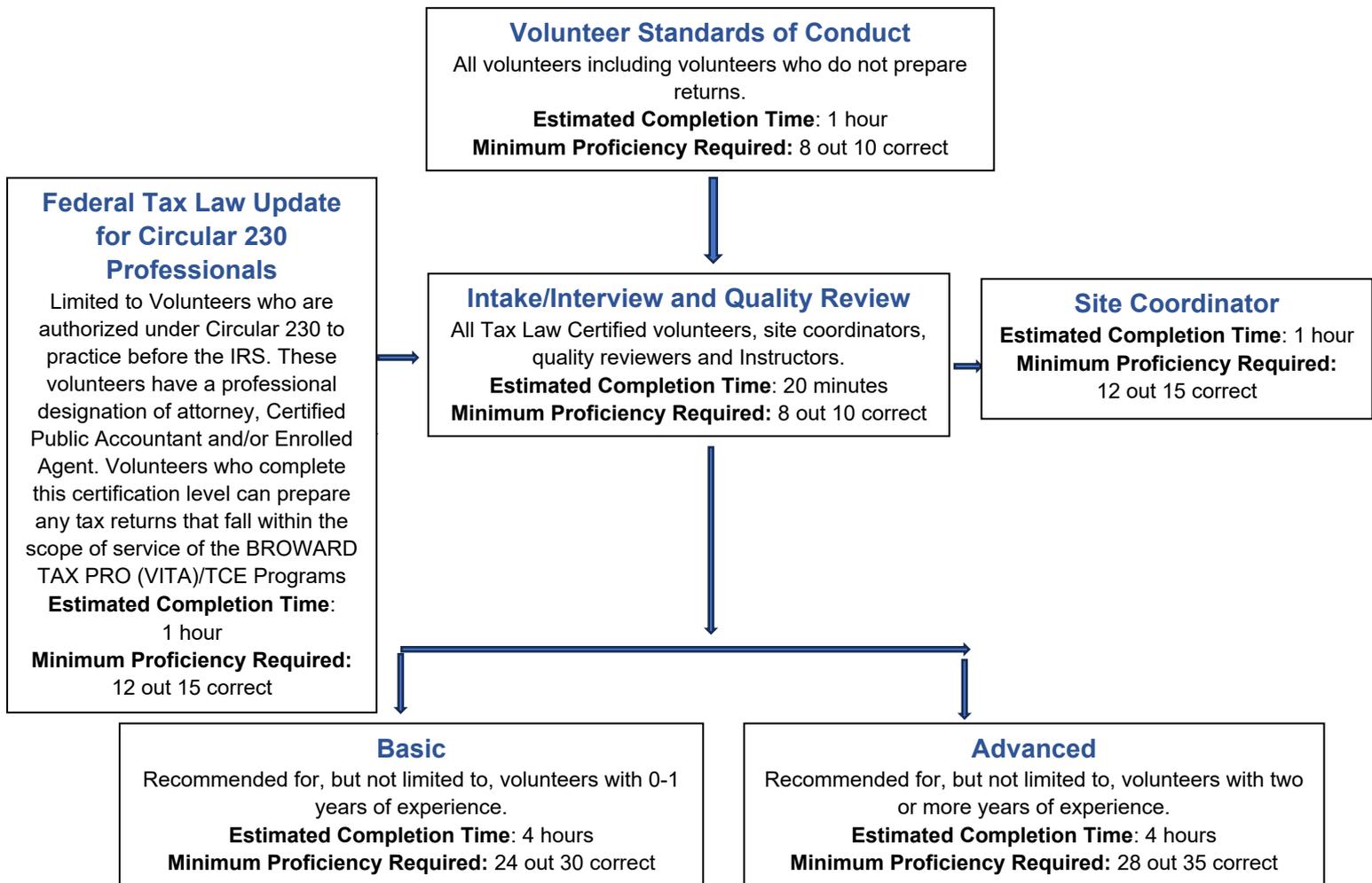
Certification Levels Include:

- Basic or Advanced Tax Law
- Circular 230 Federal Tax Law Update (for attorneys, CPAs, EAs)

Additional Resources

There are several excellent TaxSlayer® videos and webinars available to help volunteers become familiar with the return preparation software.

2026 VOLUNTEER CERTIFICATION TESTS



Please refer to the Form 6744 (2025 Tax Returns) for changes to any of the certification requirements. The current chart is based on IRS Form 6744 (2024 Tax Returns).

Form 13615

Before beginning your service at a Broward Tax Pro (BROWARD TAX PRO (VITA)) site, you must submit a signed Volunteer Agreement Form 13615 as proof of certification. This form should be downloaded from your Link & Learn account once you pass the certification test(s) and must also be emailed for recordkeeping to: Elizabeth Chery, Broward Tax Pro Program Assistant at echery@hispanicunity.org.

Affidavit of Good Moral Character

A signed and notarized Affidavit of Good Moral Character is required and should be completed during the in-person Open House(s). If you are unable to attend an In-person Open House, please coordinate with the individuals below to complete and sign your affidavit and have it notarized prior to attending any training or signing out any training resources.

- Elizabeth Jacques Chery (VITA Program Assistant) at echery@hispanicunity.org or
- Cindy Ariza (Chief Technical Officer) at cariza@handsonsouthflorida.org

Samples of the forms referenced above are available on pages 9 – 14 of this handbook for your review.

BROWARD TAX PRO (VITA) Volunteer Agreement (2 pages)

[BROWARD TAX PRO \(VITA\) Program](#)

Form **13615**
(October 2020)

Department of the Treasury - Internal Revenue Service

**Volunteer
Standards of Conduct Agreement –
VITA/TCE Programs**

The mission of the VITA/TCE return preparation programs is to assist eligible taxpayers in satisfying their tax responsibilities by providing free tax return preparation. To establish the greatest degree of public trust, volunteers are required to maintain the highest standards of ethical conduct and provide quality service.

Use of Form 13615: This form provides information on a volunteer's certification. All VITA/TCE volunteers (whether paid or unpaid workers) must pass the Volunteer Standards of Conduct certification, and sign and date Form 13615, Volunteer Standards of Conduct Agreement, prior to working at a VITA/TCE site. In addition, return preparers, quality reviewers, site coordinators, and VITA/TCE tax law instructors must certify in the Intake/Interview & Quality Review and tax law prior to signing this form. This form is not valid until the site coordinator, sponsoring partner, instructor, or IRS contact confirms the volunteer's identity, with a government-issued photo ID, and signs and dates the form.

Standards of Conduct: As a volunteer in the VITA/TCE Programs, you must:

- | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1) Follow the Quality Site Requirements (QSR).</p> <p>2) Not accept payment, solicit donations, or accept refund payments for federal or state tax return preparation from customers.</p> <p>3) Not solicit business from taxpayers you assist or use the information you gained about them for any direct or indirect personal benefit for you or any other specific individual.</p> | <p>4) Not knowingly prepare false returns.</p> <p>5) Not engage in criminal, infamous, dishonest, notoriously disgraceful conduct, or any other conduct deemed to have a negative effect on the VITA/TCE Programs.</p> <p>6) Treat all taxpayers in a professional, courteous, and respectful manner.</p> |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Failure to comply with these standards could result in, but is not limited to, the following:

- Your removal from all VITA/TCE Programs;
- Inclusion in the IRS Volunteer Registry to bar future VITA/TCE activity indefinitely;
- Deactivation of your sponsoring partner's site VITA/TCE EFIN (electronic filing ID number);
- Removal of all IRS products, supplies, loaned equipment, and taxpayer information from your site;
- Termination of your sponsoring organization's partnership with the IRS;
- Termination of grant funds from the IRS to your sponsoring partner; and
- Referral of your conduct for potential TIGTA and criminal investigations.

Taxpayer Impact: Taxpayer trust in the IRS and the local sponsoring partner organization is jeopardized when ethical standards are not followed. Fraudulent returns that report incorrect income, credits, or deductions can result in many years of interaction with the IRS as the taxpayer tries to pay the additional tax plus interest and penalties. This can result in an extreme burden for the taxpayer as the taxpayer tries to resolve the errors made on his or her return.

Volunteer Protection: The Volunteer Protection Act generally protects unpaid volunteers from liability for acts or omissions that occur while acting within the scope of their responsibilities at the time of the act or omission. It provides no protection for harm caused by willful or criminal misconduct, gross negligence, reckless misconduct, or a conscious, flagrant indifference to the rights or safety of the individual harmed by the volunteer.

For additional information on the volunteer standards of conduct, please refer to Publication 4961, Volunteer Standards of Conduct - Ethics Training.

Privacy Act Notice – The Privacy Act of 1974 requires that when we ask for information we tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it, and whether your response is voluntary, required to obtain a benefit, or mandatory.

Our legal right to ask for information is 5 U.S.C. 301. We are asking for this information to assist us in contacting you relative to your interest and/or participation in the IRS volunteer income tax preparation and outreach programs. The information you provide may be furnished to others who coordinate activities and staffing at volunteer return preparation sites or outreach activities. The information may also be used to establish effective controls, send correspondence and recognize volunteers. Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to use your assistance in these programs. Please note: Sponsoring organizations may perform background checks on their volunteers.

IRC 7216(a) - Imposes criminal penalties on tax return preparers who knowingly or recklessly make unauthorized disclosures or uses of information furnished in connection with the preparation of an income tax return. A violation of IRC 7216 is a misdemeanor, with a maximum penalty of up to one year imprisonment or a fine of not more than \$1,000, or both, together with the cost of prosecution.

Volunteer:

By signing this form, I declare that I have completed Volunteer Standards of Conduct certification and have read, understand, and will comply with the standards of conduct. I also certify that I am a U.S. citizen, a legal resident, or otherwise reside in the U.S. legally.

Full name <i>(please print)</i>		Volunteer position(s)		<input type="checkbox"/> IRS Employee
Home address <i>(street, city, state and ZIP code)</i>				
Email address	Daytime telephone	Sponsoring partner name/site name		
Number of years volunteered <i>(including this year)</i>	Signature <i>(electronic)</i>	OR	Signature <i>(type/print)</i>	Date

Volunteer Certification Levels *(Add the letter "P" for all passing test scores)*

Standards of Conduct <i>(Required for ALL)</i>	Intake/Interview & Quality Review	Site Coordinator Test	Basic	Advanced	Military	International	Puerto Rico		Foreign Students
							1	2	

Was Site Coordinator Training completed? *(Required for coordinators and alternate coordinators)*

Federal Tax Law Update Test Only for Circular 230 Professionals Qualified Experienced Volunteer Test

Federal Tax Law Update Test for Circular 230 Professionals: Only volunteers in good standing as an attorney, CPA, or Enrolled Agent can take this certification. To qualify for this certification, the license information below must be completed by the volunteer and verified by the partner or site coordinator. Volunteers with this certification level can prepare any tax returns that fall within the scope of the VITA/TCE Programs. (Advanced, Military, etc.) A Scope of Service Chart is located in Publication 4012, VITA/TCE Volunteer Resource Guide. See [Publication 1084](#), Site Coordinator Handbook, for additional requirements and instructions.

Note: Advanced certification is necessary to qualify for Continuing Education (CE) Credits. Neither the Federal Tax Law Update Test nor the Qualified Experienced Volunteer Test qualify the volunteer to receive CE Credits. Refer to [Publication 5362](#), Fact Sheet - Continuing Education Credits, for additional requirements for CE Credits.

Professional designation <i>(Attorney, CPA, or Enrolled Agent)</i>	Licensing jurisdiction <i>(state)</i>	Bar, license, registration, or enrollment number	Effective or issue date	Expiration date <i>(if provided)</i>
-----------------------------------------------------------------------	------------------------------------------	--------------------------------------------------	-------------------------	-----------------------------------------

Site Coordinator, Sponsoring Partner, Instructor or IRS Contact: By signing this form, I declare that I have verified the required certification level(s) and government-issued photo ID for this volunteer prior to allowing the volunteer to work at the VITA/TCE site.

Approving Official's <i>(printed)</i> name and title <i>(site coordinator, sponsoring partner, instructor or IRS contact)</i>	Signature <i>(electronic)</i>	OR	Signature <i>(type/print)</i>	Date
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Parent/Guardian: By signing this form, I declare that I give permission for my child to volunteer in the VITA/TCE Programs.

Parent/Guardian name <i>(printed)</i>	Signature <i>(electronic)</i>	OR	Signature <i>(type/print)</i>	Date
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For Continuing Education (CE) Credits ONLY
(to be completed by the site coordinator or partner)

Instructions: Complete this section when an unpaid certified volunteer is requesting Continuing Education (CE) credits. CE credits **will not be issued without a PTIN** for Enrolled Agents or Non-credentialed preparers. CPAs, attorneys, or CFPs do not require a PTIN; however, they must check with their governing board requirements for obtaining CE Credits. **The site coordinator, sponsoring partner, or instructor must sign and date this form** and send the completed form to the SPEC Territory Office/Relationship Manager for further processing. Refer to [Publication 5362](#), Fact Sheet - Continuing Education Credits or [Publication 4396-A](#), Partner Resource Guide, for additional requirements and instructions.

First and last name on PTIN account	Volunteer Preparer's Tax Identification Number (PTIN) P - _____	CTEC ID number <i>(if applicable)</i> A - _____
Address <i>(VITA/TCE Site or teaching location)</i>	Site Identification Number (SIDN) S - _____	

Professional Status *(check only one box)*

Enrolled Agent (EA) Certified Public Accountant (CPA) Non-credentialed Tax Return Preparer *(Participating in the Annual Filing Season Program)*

Attorney Certified Financial Planner (CFP)

Certification Level <i>(Check only one box below)</i>	Volunteer Hours <i>(Minimum of 10 volunteer hours required to issue CE Credits)</i>
<input type="checkbox"/> Advanced	Total hours volunteered <i>(qualifies for 14 CE credits)</i> _____
OR	OR
<input type="checkbox"/> Advanced and One or More Specialty Courses	Total hours volunteered <i>(qualifies for 18 CE credits)</i> _____

Site Coordinator, Sponsoring Partner, or Instructor: By signing this form, I declare that I have validated that the reported volunteer hours are based on the activities this volunteer performed in my site or training facility.

Approving Official's <i>(printed)</i> name and title <i>(site coordinator, sponsoring partner, instructor)</i>	Signature <i>(electronic)</i>	OR	Signature <i>(type/print)</i>	Date
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AFFIDAVIT OF GOOD MORAL CHARACTER

State of Florida

County of _____

Before me this day personally appeared _____ who, being duly sworn, deposes and says:

(Applicant's/Employee's Name)

As an applicant for employment with, an employee of, a volunteer for, or an applicant for certification with _____, I affirm and attest under penalty of perjury that I meet the moral character requirements for employment, as required by the Florida Statutes and rules, in that:

I have not been arrested with disposition pending or found guilty of, regardless of adjudication, or entered a plea of nolo contendere or guilty to or have been adjudicated delinquent and the record has not been sealed or expunged for, any offense prohibited under any of the following provisions of the Florida Statutes or under any similar statute of another jurisdiction for any of the offenses listed below:

- | | |
|-------------------------|---------------------------------------------------------------------------------------------------------------------|
| | <u>Relating to:</u> |
| Section: 39.205 | failure to report child abuse, abandonment, or neglect |
| Section: 393.135 | sexual misconduct with certain developmentally disabled clients and reporting of such sexual misconduct |
| Section: 394.4593 | sexual misconduct with certain mental health patients and reporting of such sexual misconduct |
| Section: 414.39 | fraud, if the offense was a felony |
| Section: 415.111 | adult abuse, neglect, or exploitation of aged persons or disabled adults or failure to report of such abuse |
| Section: 741.28 | criminal offenses that constitute domestic violence, whether committed in Florida or another jurisdiction |
| Section: 777.04 | attempts, solicitation, and conspiracy to commit an offense listed in this subsection |
| Section: 782.04 | murder |
| Section: 782.07 | manslaughter, aggravated manslaughter of an elderly person or disabled adult, or aggravated manslaughter of a child |
| | vehicular homicide |
| Section: 782.071 | killing an unborn child by injury to the mother |
| Section: 782.09 | assault, battery, and culpable negligence, if the offense was a felony |
| Chapter: 784 | assault, if the victim of the offense was a minor |
| Section: 784.011 | aggravated assault |
| Section: 784.021 | battery, if the victim of the offense was a minor |
| Section: 784.03 | aggravated battery |
| Section: 784.045 | battery on staff or a detention or commitment facility or on a juvenile probation officer |
| Section: 784.075 | kidnapping |
| Section: 787.01 | false imprisonment |
| Section: 787.02 | luring or enticing a child |
| Section: 787.025 | taking, enticing, or removing a child beyond the state limits with criminal intent pending custody proceeding |
| Section: 787.04(2) | carrying a child beyond the state lines with criminal intent to avoid producing a child at a custody hearing or |
| Section: 787.04(3) | delivering the child to the designated person |
| Section: 787.06 | human trafficking |
| Section: 787.07 | human smuggling |
| Section: 790.115(1) | exhibiting firearms or weapons within 1,000 feet of a school |
| Section: 790.115(2) (b) | possessing an electric weapon or device, destructive device, or other weapon on school property |
| Section: 794.011 | sexual battery |
| Former Section: 794.041 | prohibited acts of persons in familial or custodial authority |
| Section: 794.05 | unlawful sexual activity with certain minors |
| Section: 794.08 | relating to female genital mutilation |
| Chapter: 796 | prostitution |
| Section: 798.02 | lewd and lascivious behavior |
| Chapter: 800 | lewdness and indecent exposure |
| Section: 806.01 | arson |

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Page 1 of 4

CF 1649, February 2025 (Obsoletes previous editions which may not be used)

- | | |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| Section: 810.02 | burglary |
| Section: 810.14 | voyeurism, if the offense is a felony |
| Section: 810.145 | video voyeurism, if the offense is a felony |
| Chapter: 812 | relating to theft, robbery, and related crimes, if the offense was a felony |
| Section: 817.563 | fraudulent sale of controlled substances, only if the offense was a felony |
| Section: 825.102 | abuse, aggravated abuse, or neglect of an elderly person or disabled adult |
| Section: 825.1025 | lewd or lascivious offenses committed upon or in the presence of an elderly person or disabled adult |
| Section: 825.103 | exploitation of disabled adults or elderly persons, if the offense was a felony |
| Section: 826.04 | incest |
| Section: 827.03 | child abuse, aggravated child abuse, or neglect of a child |
| Section: 827.04 | contributing to the delinquency or dependency of a child |
| Former Section: 827.05 | negligent treatment of children |
| Section: 827.071 | sexual performance by a child |
| Section: 831.311 | unlawful sale, manufacture, alteration, delivery, uttering, or possession of counterfeit-resistant prescription blanks for controlled substances |
| Section: 836.10 | written or electronic threats to kill, do bodily injury, or conduct a mass shooting or an act of terrorism |
| Section: 843.01 | resisting arrest with violence |
| Section: 843.025 | depriving a law enforcement, correctional, or correctional probation officer means of protection or communication |
| Section: 843.12 | aiding in an escape |
| Section: 843.13 | aiding in the escape of juvenile inmates in correctional institution |
| Chapter: 847 | obscene literature |
| Section: 859.01 | poisoning food or water |
| Section: 873.01 | prohibition on the purchase or sale of human organs and tissues |
| Section: 874.05 | encouraging or recruiting another to join a criminal gang |
| Chapter: 893 | drug abuse prevention and control, only if the offense was a felony or if any other person involved in the offense was a minor |

I also affirm that I have not been designated as a sexual predator pursuant to s. 775.21; a career offender pursuant to s. 775.261; or a sexual offender pursuant to s. 943.0435, unless the requirement to register as a sexual offender has been removed pursuant to s. 943.04354.

SIGNATURE OF AFFIANT: _____

I understand that I must acknowledge the existence of any applicable criminal record relating to the above lists of offenses including those under any similar statute of another jurisdiction, regardless of whether or not those records have been sealed or expunged.

SIGNATURE OF AFFIANT: _____

I understand that, while employed or volunteering at _____ in any position that requires background screening as a condition of employment, I must immediately notify my supervisor/employer of any arrest and any changes in my criminal record involving any of the above listed provisions of Florida Statutes or similar statutes of another jurisdiction whether a misdemeanor or felony. This notice must be made within one business day of such arrest or charge. Failure to do so could be grounds for termination.

SIGNATURE OF AFFIANT: _____

CONTINUED ON NEXT PAGE

I attest that I have read the above carefully and state that my attestation here is true and correct that **my record does not contain any of the above listed offenses**. I also understand that it is my responsibility to obtain clarification on anything contained in this affidavit which I do not understand prior to signing. I am aware that any omissions, falsifications, misstatements or misrepresentations may disqualify me from employment consideration and, if I am hired, may be grounds for termination or denial of an exemption at a later date.

SIGNATURE OF AFFIANT: _____

Sign Above OR Below, DO NOT Sign Both Lines

To the best of my knowledge and belief, **my record contains one or more of the applicable disqualifying acts or offenses listed above. I have placed a check mark by the offense(s) contained in my record.** (If you have previously been granted an exemption for this disqualifying offense, please attach a copy of the letter granting such exemption.) (Please circle the number which corresponds to the offense(s) contained in your record.)

SIGNATURE OF AFFIANT: _____

Sworn to and subscribed before me this ____ day of _____, 20__.

SIGNATURE OF NOTARY PUBLIC, STATE OF FLORIDA

(Print, Type, or Stamp Commissioned Name of Notary Public)

(Check one)

Affiant personally known to notary

OR

Affiant produced identification
Type of identification produced: _____

BROWARD TAX PRO (VITA) VOLUNTEERING ONBOARDING PROCESS

Welcome to the Broward Tax Pro (BROWARD TAX PRO (VITA)) program! We're excited to have you join us to make a meaningful impact within local communities. Please follow the steps below to begin your journey as a BROWARD TAX PRO (VITA) volunteer:

Step 1: Create or Update Your HandsOn Account

Before registering for orientation, please create or update your volunteer account on the HandsOn South Florida website. www.handsonbroward.org

This ensures your information is current and allows you to access all required onboarding activities.

For assistance, contact: Cindy Ariza (Chief Technical Officer) at cariza@handsonsouthflorida.org

Step 2: Register for the Online Orientation

Once your account is set up, view the mandatory online [orientation session](#) via the HandsOn South Florida website.

Step 3: Orientation Completion & Background Check Initiation

After completing orientation:

- HandsOn South Florida will share your information with the BROWARD TAX PRO (VITA) team
- Your instructions for ordering the background check using a GOOD DEED code will be provided after you complete the on-line Orientation. Volunteers having trouble using the code may receive an e-Vite that expires within 72 hours of its receipt.
- **Background check fee:** up to \$25

Step 4: Background Check Confirmation

The Broward Broward Tax Pro (VITA) Coalition is committed to ensuring the safety and security of the clients, employees, volunteers and others, and safeguarding the interests of the BROWARD TAX PRO (VITA) program. To protect the integrity of the program, all volunteers must undergo a background screening, which includes:

- Employment history
- Statewide criminal history (FDLE)
- National Sex Offender Registry
- Local law enforcement records (if applicable)

Turnaround time: 24–48 hours

Level 2 background screening

- Required for volunteers with **5+ years** in the program
- Includes fingerprints and photos
- **Background check fee:** covered by Broward Tax Pro. You will receive instructions prior to ordering the background check.

Turnaround time: Varies per volunteer.

Upon completion of the background check, you will receive confirmation of your eligibility to continue the next steps in the volunteer enrollment process from the BROWARD TAX PRO (VITA) Team.

For assistance, contact Elizabeth Jacques Chery (VITA Program Assistant) at echery@hispanicunity.org

Step 5: Register and attend an Open House

Once you register, join a virtual or in-person Open House led by HandsOn South Florida. The session includes:

- Overview of the BROWARD TAX PRO (VITA) program
- Introduction to key partners and supports
- Volunteer roles and responsibilities
- Completion of a notarized Affidavit of Good Moral Character
- Registration for volunteer training courses

Step 6: Complete Training & Certification

- Complete all required training sessions you've registered for.
- Pass the **Advanced Level certification**
- Submit your signed **IRS Form 13615 (Volunteer Agreement)** to:
Elizabeth Jacques Chery (VITA Program Assistant): echery@hispanicunity.org

Step 7: Site Selection Shift & Availability Survey

After submitting your signed Volunteer Agreement (IRS Form 13615), you'll receive a survey to indicate your site preferences and schedule of availability. Once matched with a tax preparation center, you may be contacted by a member of the BROWARD TAX PRO (VITA) staff to confirm your shift schedules before you begin providing services to taxpayers on site.

Prior to the start of the tax filing season and the opening of the BROWARD TAX PRO (VITA) sites, we will invite all volunteers and staff to attend a volunteer mixer where volunteers can meet BROWARD TAX PRO (VITA) staff members, learn the ins and outs of volunteering at a site, confirm shift schedules, and share contact information for further communication and scheduling.

Step 8: Maintain Updated Contact, Certifications, and Volunteer hours

Keep your email, phone number, certification status, and recording of volunteer hours current. This ensures accurate reports to the IRS of volunteer status, volunteer hours, qualification for continuing education credits, and much more.

Need Help?

✉ Elizabeth Jacques Chery – echery@hispanicunity.org

✉ Cindy Ariza – cariza@handsonsouthflorida.org

Volunteering Across Cultures: Building Bridges in Broward

South Florida's multicultural community is one of its greatest strengths, and will be reflected in the clients and fellow volunteers you meet at the BROWARD TAX PRO (VITA) sites. Culture shapes people's traditions, languages, values, and perspectives, and it is essential that we honor and respect these differences in every interaction.

As a BROWARD TAX PRO (VITA) volunteer, you are expected to treat every client with dignity, patience, and respect, regardless of race or cultural background or personal circumstances. This means listening carefully, avoiding assumptions, using clear and inclusive language, and always maintaining professionalism. By upholding these standards of conduct, you help ensure that every taxpayer feels welcomed, valued, and supported throughout the process.

Benefits of Volunteering

- ✓ Serve your community
- ✓ Personal fulfillment
- ✓ Build social networks
- ✓ Gain work experience
- ✓ Boost self-confidence
- ✓ Learn new skills
- ✓ Meet new challenges
- ✓ Pathway to employment
- ✓ Enhance your resume

Tips for Positive Experiences

- ✓ Choose the right volunteer role
- ✓ Set personal priorities
- ✓ Avoid overcommitting
- ✓ Be realistic about goals
- ✓ Change roles if needed
- ✓ Ask for help when necessary
- ✓ Take breaks when needed
- ✓ Keep perspective
- ✓ Have fun and laugh!

BROWARD TAX PRO (VITA) VOLUNTEER RIGHTS

As a BROWARD TAX PRO (VITA) volunteer, you have the right to:

- Receive orientation, training, and support to carry out your role
- Work in a safe and healthy environment
- Be informed about the organization
- Understand and fulfill your responsibilities (read the below list of duties and responsibilities)
 - ✓ *Assist with daily BROWARD TAX PRO (VITA) site set up and breakdown (where applicable).*
 - ✓ *Review all taxpayer documents to ensure preparedness before starting the return preparation process.*
 - ✓ *Distribute demographic and satisfaction surveys with instructions to all taxpayers.*
 - ✓ *Interview taxpayers by using IRS Form 13614-C 100% of the time and confirm taxpayer's scenario is within scope of the BROWARD TAX PRO (VITA) program.*
 - ✓ *Regularly use IRS publications 4012 and 17 throughout the intake/interview and tax preparation process.*
 - ✓ *Review all Quality Tax Alerts and Quality Site Requirement Alerts distributed at all BROWARD TAX PRO (VITA) sites per the Site Coordinator's instructions.*
 - ✓ *Answer all taxpayers' questions throughout the tax preparation process.*
 - ✓ *Collect 100% of demographic surveys, ensure completion, and deposit in file folder as instructed by the Site Coordinator*
 - ✓ *Inform taxpayers of refunds and options to receive refunds or tax debts, methods of payment and payment deadline.*
 - ✓ *Alert Site Coordinator of special accommodation requested by taxpayers.*
 - ✓ *All other duties as assigned.*

BROWARD TAX PRO (VITA) VOLUNTEER RESPONSIBILITIES

As a BROWARD TAX PRO (VITA) volunteer, you are expected to:

- Carry out the specified duties and responsibilities
- Be accountable for your actions
- Complete the required training (in class and on-site)
- Complete the training course you signed up for
- Ask for support when needed and support other team members
- Fulfill at least 50 hours of service throughout the tax season
- Be courteous to taxpayers, staff and other volunteers
- Share any concerns or accolades directly to BROWARD TAX PRO (VITA) program staff
- Refrain from making negative remarks about others vs. providing constructive feedback
- Provide at least 24-hour notice before canceling a shift or leaving the BROWARD TAX PRO (VITA) program.
- Notify the BROWARD TAX PRO (VITA) Site Coordinator when unable to perform volunteer duties

BROWARD TAX PRO (VITA) COALITION RIGHTS & RESPONSIBILITIES

Rights

- Review volunteer performance
- Expect task completion
- Expunge and report volunteers who are not compliant with the rules and standards of conduct
- Define volunteer roles and expectations

Responsibilities

- Provide clear role outlines
- Offer orientation and training
- Establish communication and conflict resolution procedures
- Ensure safe working conditions
- Provide supervision and emergency protocols

DRESS CODE: BUSINESS CASUAL

Volunteers are expected to adhere to business casual attire while serving at BROWARD TAX PRO (VITA) sites. Clothing should be neat, clean, and professional, reflecting the respect we show to the clients and communities we serve.

Examples of appropriate attire include:

- Collared shirts, blouses, or sweaters
- Slacks, khakis, or modest skirts/dresses
- Closed-toe shoes

SEXUAL HARASSMENT POLICY

Harassment, including sexual harassment and bullying, has no place in the workplace and will not be tolerated. Any form of harassment and/or bullying where a volunteer feels offended, humiliated, or intimidated by that conduct must cease immediately. If you raise a concern or report an incident, it will be treated seriously, carefully, quickly and confidentially.

For further information, contact your Site Coordinator or partner manager.

EQUAL OPPORTUNITY POLICY

What is Discrimination?

Discrimination is treating someone unfairly because they belong to a particular group of people.

It is against the law to discriminate on the following basis:

- ✓ Race
- ✓ Color
- ✓ Religion
- ✓ Gender
- ✓ Sexual Orientation
- ✓ National Origin
- ✓ Age
- ✓ Disability
- ✓ Political Affiliation or Belief

BROWARD TAX PRO (VITA) COALITION CONTACT INFORMATION

BROWARD TAX PRO (VITA) Program



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This program would not be possible without the support and collaborative leadership of:

