

VITA Volunteer Certification Requirements
Cerritos College VITA Day
March 23, 2024

Saturday, March 23, 2024, from 9:00 am – 2:30 pm is the Cerritos College accounting department's annual VITA event. Taxpayers earning less than \$64,000 for tax year 2023, and who meet the additional income requirements on the following sheet, can have their federal and state tax returns prepared and filed for free. Enrollment or employment at Cerritos College is not required to have taxes prepared. Free parking will be available in Lot 6.

Please tell your family, friends, coworkers, and neighbors about this event. Appointments can be made at the link below and walk-ins are welcome.

cerritosvita.youcanbook.me

Accounting students are encouraged to volunteer at the Cerritos College VITA Day. To volunteer you will need to complete the following prior to March 23, 2024:

1. Pass the "Standards of Conduct" test
2. Pass the "Intake Interview" test
3. Pass the "Basic" or "Advanced" tax preparation test
4. Sign Form 13615 and bring it with you to the VITA event

A certification training video can be viewed at the link below. The video takes you through the certification testing process step-by-step. Watch the video and follow along to get certified to volunteer at our VITA event.

<https://us02web.zoom.us/rec/share/X7hBDvW7OU4-UIVOC74OS5GD6yPbsx7McNZZ2xdITXL19MOzRj8skhzRsUo041bb.4XBt3hg3-t0Fqg8R>

Passcode: ELS&Hs@4

On Tuesday, 2/20/24, from 11:00 am - 12:30 pm, BE 122 will be open for VITA volunteers to work on the VITA certification tests. On VITA Day, the online Tax Slayer tax program will be used. Access to the Tax Slayer practice lab is available at:

[Vita.taxslayerpro.com](https://vita.taxslayerpro.com)

Password: TRAINPROWEB (all caps)

Volunteers are encouraged to attend the entire event, however, that is not required. Please let me know by Saturday, March 16, 2024, what hours you can volunteer at the VITA event so we can be sure the entire day has adequate coverage. Email tlantz@cerritos.edu with the hours you will be volunteering.

Tax Appointment Reminders

REMINDER *What to Bring*:

- For married filing joint, both spouses MUST be present
- Government issued valid photo identification for you and your spouse (if married)
- Original Social Security Cards or Individual Taxpayer Identification Number (ITIN) / cards for **yourself, your spouse, and dependents.**
- Birth dates for you, spouse, and/or dependents
- A copy of last year's tax return (*optional*)
- All forms W-2 and 1099, Information for other income
- Health Insurance Statements: Forms 1095-A, B or C (ACA Statements)
- Information for all deductions and credits (including charitable contributions)
- Total paid to daycare provider and their tax ID number
- For direct deposit of refund, proof of account, account number, and bank's routing number
- For prior year returns, copies of income transcripts from IRS (and state, if applicable)

-Customers should arrive 10-15 minutes prior to their appointment

-Any Appointment that arrives 15 or more minutes late MAY HAVE TO RESCHEDULE

***Please note: The event does not offer services pertaining to
business income with a loss (Schedule C)
or capital gains (Schedule D)***