

# Site Coordinator Test Questions

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## Directions

Review the Site Coordinator training and answer the following questions.

1. The Site Coordinator Test is optional for the designated coordinator and alternate coordinators.
  - a. True
  - b. False
2. Which IRS publication includes the roles and responsibilities of the site coordinator?
  - a. Publication 5166, VITA/TCE Volunteer Quality Site Requirements
  - b. Publication 5683, VITA/TCE Handbook for Partners and Site Coordinators
  - c. Publication 4299, Privacy, Confidentiality and Civil Rights - A Public Trust
  - d. Publication 4012, VITA/TCE Volunteer Resource Guide
3. Prior to signing and dating the Form 13615, Volunteer Standards of Conduct Agreement – VITA/TCE Programs, the sponsoring partner’s approving official must confirm government-issued photo identification and the required certification level of the volunteer for the Form 13615 to be valid.
  - a. True
  - b. False
4. If partner-owned computers or IRS-loaned computers or printers are lost or stolen, the partner is required to notify the local SPEC territory office \_\_\_\_\_.
  - a. Before May 15
  - b. Within 30 days or as soon as possible
  - c. Immediately or by the next business day
  - d. Before the end of the calendar year
5. According to QSR 4 Reference Materials, all sites are required to have the following available for use at VITA/TCE sites in paper or electronic format:
  - Publication 17, Your Federal Income Tax (For Individuals)
  - Publication 4012, VITA/TCE Volunteer Resource Guide
  - Publication 4299, Privacy, Confidentiality and Civil Rights - A Public Trust
  - Volunteer Tax Alerts (VTA) and Quality Site Requirement Alerts (QSRA). AARP Foundation Tax Aide uses CyberTax Alerts instead of VTAs and QSRA
  - a. True
  - b. False
6. Coordinators are required to have a correct Quality Review process for 100% of the returns prepared at VITA/TCE sites. The two acceptable methods of quality review are:
  - a. Self-Review and Peer-to-Peer Review
  - b. Peer-to-Peer Review and Designated Review
  - c. Designated Review and Self-Review
  - d. Taxpayer Review and Designated Review

7. All questions in Parts I-V of the Form 13614-C, Intake/Interview and Quality Review Sheet must be verified and all “Unsure” answers must be changed to “Yes” or “No”.
- a. True
  - b. False
8. It is acceptable to use IRS-loaned equipment (including laptops and printers) outside of the scope of the VITA/TCE program, such as for personal use after site hours.
- a. True
  - b. False
9. Which of the following is **not** a qualifying certification to earn Continuing Education Credits?
- a. Military
  - b. Advanced
  - c. Federal Tax Law Update Test for Circular 230 Professionals
  - d. International
10. Prior to opening, each site must have Form 15272, VITA/TCE Security Plan, approved \_\_\_\_\_ and a copy available at the site.
- a. Annually
  - b. Monthly
  - c. Every other year
  - d. Before the end of the filing season
11. Which IRS publication covers requirements for alternative filing methods including virtual or not in-person tax preparation processes?
- a. Publication 5166, VITA/TCE Volunteer Quality Site Requirements
  - b. Publication 4012, VITA/TCE Volunteer Resource Guide
  - c. Publication 4961, VITA/TCE Volunteer Standards of Conduct - Ethics Training
  - d. Publication 5450, VITA/TCE Site Operations
12. At a minimum, all Wi-Fi or wireless connections at a VITA/TCE tax preparation site must be encrypted and password protected.
- a. True
  - b. False

- 13.** When conducting taxpayer interviews in close proximity, it is important to limit unauthorized access to taxpayer information and ensure privacy (for example, positioning computer screens, protecting taxpayer documents and preventing others from hearing sensitive information).
- a.** True
  - b.** False
- 14.** Once a volunteer is added to the Volunteer Registry, how long are they removed from volunteering in VITA/TCE program?
- a.** For a month
  - b.** Indefinitely
  - c.** For a filing season
  - d.** For a year
- 15.** A VITA/TCE data breach occurs when a taxpayer's personally identifiable information (PII) is shared, used or disclosed, whether physical or electronic, without taxpayer permission.
- a.** True
  - b.** False