Site Coordinator Certification Retest Questions

Directions

Review the Site Coordinator training and answer the following questions.

1. Coordinators and alternate coordinators are required to pass with a score of 80% or higher:

   a. Volunteer Standards of Conduct Test

   b. Site Coordinator Test

   c. Both a and b

   d. None of the above

2. Publication 5166, VITA/TCE Volunteer Quality Site Requirements, is the primary IRS resource for coordinator roles and responsibilities.

   a. True

   b. False

3. Form 13615, Volunteer Standards of Conduct Agreement – VITA/TCE Programs is **not** valid until the sponsoring partner's approving official signs and dates the form after confirming the volunteer's_____.

   a. Government-issued photo identification

   b. Certification levels on Form 13615, Volunteer Standards of Conduct Agreement - VITA/TCE Programs

   c. Both a and b

   d. None of the above

4. Partner-owned computers or IRS-loaned computers and printers that are lost or stolen, must be reported to the local SPEC territory office before May 15.

   a. True

   b. False

5. According to QSR 4 Reference Materials, VITA/TCE Volunteer Tax Alerts and Quality Site Requirement Alerts (AARP Foundation Tax Aide uses CyberTax Alerts) are required to be available for use at each site. What other reference materials are required?

   a. Pub 4012, VITA/TCE Volunteer Resource Guide and Pub 17, Your Federal Income Tax (For Individuals)

   b. Pub 5683, VITA/TCE Handbook for Partners and Site Coordinators and Pub 5166, VITA/TCE Volunteer Quality Site Requirements

   c. Pub 4299, Privacy, Confidentiality and Civil Rights - A Public Trust

   d. Both a and c

6. The acceptable types of quality review at VITA/TCE sites are: Designated Review, Peer-to-Peer Review, and Self-Review.

   a. True

   b. False

7. All questions in Parts I-V of the Form 13614-C, Intake/Interview and Quality Review Sheet must be marked as:

    a. Yes

    b. No

    c. Unsure

    d. Either yes or no

8. The use of IRS-loaned equipment (including laptops and printers) is restricted to the preparation and filing of electronic tax returns and related program activities that support the VITA/TCE free tax preparation program. IRS-loaned equipment may not be used for commercial purposes, games, or other personal use.

    a. True

    b. False

9. The Federal Tax Law Update Test for Circular 230 Professionals Test is a qualifying certification for receiving Continuing Education Credits.

    a. True

    b. False

10. Form 15272, VITA/TCE Security Plan, must be approved annually by the local SPEC territory office.

    a. True

    b. False

11. Publication 5450, VITA/TCE Site Operations, covers requirements for alternative filing methods including virtual or not in-person tax preparation processes.

    a. True

    b. False

12. IRS sponsored free tax preparation sites must use the following Wi-Fi or wireless connection:

    a. Public access Wi-Fi or wireless connection

    b. Encrypted and password protected Wi-Fi or wireless connection

    c. Unsecured wired internet connection

    d. Volunteer's unsecured wireless Hotspot connection

13. Volunteers must ensure that taxpayer privacy is protected when sharing personally identifiable information (PII). During conversations with taxpayers in close proximity,_____ should **not** be discussed out loud.

    a. SSNs

    b. Addresses

    c. Bank account numbers

    d. All of the above

14. Volunteers who violate the Volunteer Standards of Conduct or commit certain unethical actions, must be reported to the local SPEC territory office for consideration to be added to the Volunteer Registry and removed from the VITA/TCE program for a period of one year.

   a. True
   b. False

15. What are examples of potential security breaches that would need to be referred to the local SPEC territory office?

   a. Loss of computer containing personally identifiable information (PII)
   b. Loss of computer bag containing tax returns
   c. Loss of taxpayer information
   d. All of the above