

Site Coordinator Test Questions

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. For a correct Intake, Interview, and Quality Review process, all questions in Parts I-V of the Form 13614-C, Intake/Interview & 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 consent form must every taxpayer sign prior to beginning a virtual tax preparation process?
 - a. No consent needed
 - b. Form 8879, IRS e-file Signature Authorization
 - c. Form 15272, VITA/TCE Security Plan
 - d. Form 14446, Virtual VITA/TCE Taxpayer Consent

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

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 loaned IRS 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. During the Intake, Interview, and Quality Review process, all questions in Parts I-V of the Form 13614-C, Intake/Interview & 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 **not** 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. Prior to beginning a virtual tax preparation process, the taxpayer(s) must agree to the virtual process by signing Form 14446, Virtual VITA/TCE Taxpayer Consent.
 - 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