

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 *(please print)* _____ Volunteer position(s) _____ IRS Employee

Home address *(street, city, state and ZIP code)* _____

Email address _____ Daytime telephone _____ Sponsoring partner name/site name _____

Number of years volunteered *(including this year)* _____ Volunteer signature _____ 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 Training	Basic	Advanced	Military	International	HSA	Puerto Rico		Foreign Students
								1	2	

Federal Tax Law Update Test for Circular 230 Professionals

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, HSA, 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 for qualification for CE Credits, the Federal Tax Law Update Test does not qualify the volunteer to receive CE Credits. See Publication 4396-A, Partner Resource Guide, for more information about 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>
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Note: SPEC established the minimum certification requirements for volunteers who are authorized under Circular 230; however, partners may establish additional certification requirements for their volunteers. Volunteers should check with the sponsoring SPEC Partner.

Site Coordinator, Sponsoring Partner, Instructor or IRS: By signing this form, I declare that I have verified the required certification level(s) and photo identification 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, etc.)</i>	Approving Official's signature and 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 the **Fact Sheet - Continuing Education Credits on the Site Coordinator Corner or Publication 4396-A, Partner Resource Guide, for additional requirements and instructions.**

Name as listed on PTIN card	Volunteer Preparer's Tax Identification Number (PTIN) P - _____	CTEC ID number <i>(if applicable)</i> A - _____
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Address <i>(VITA/TCE Site or teaching location)</i>	Site Identification Number (SIDN) S - _____
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Professional Status *(check only one box)*

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|--|--|---|
| <input type="checkbox"/> Enrolled Agent (EA) | <input type="checkbox"/> Certified Public Accountant (CPA) | <input type="checkbox"/> Non-credentialed Tax Return Preparer
<i>(Participating in the Annual Filing Season Program)</i> |
| <input type="checkbox"/> Attorney | <input type="checkbox"/> 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 *(printed)* name and title *(site coordinator, sponsoring partner, instructor)* _____

Approving Official's signature	Date signed
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Basic

Advanced

Military

International

Puerto Rico

Foreign Student

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	<input checked="" type="checkbox"/> You may sign your Volunteer Agreement #1 electronically by checking this box
2017 Volunteer Standards of Conduct - Exam	100.00 %	Pass Print Certificate	1	<p>Eric Todd 12/04/2017</p> <hr/> <p>#2 Click here to open and complete your Volunteer Agreement. Click Print from the file menu to print the page.</p> <p>Save the Volunteer Agreement for your records.</p> <p>If you would like to review the Volunteer Standards of Conduct course, click here to review the course in PDF format.</p>
2017 Intake/Interview and Quality Review Exam	100.00 %	Pass Print Certificate	1	
2017 Site Coordinator Training	Complete	Print Certificate	N/A	
2017 Advanced Exam	100.00 %	Pass Print Certificate	1	
2017 Health Savings Accounts (HSA) Exam		In progress	0	