

# 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. When must a volunteer pass the Site Coordinator Test?
  - a. Within 30 days of becoming a site coordinator
  - b. Before the site opens for the filing season
  - c. Before performing any site coordinator duties
  - d. Before conducting their first quality review
3. 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
4. Before a volunteer signs and dates Form 13615, the sponsoring partner's approving official must verify the volunteer's identity, name, address, and required certification level.
  - a. True
  - b. False
5. If a partner-owned or IRS-loaned computer or printer is lost or stolen, when must the partner notify the local SPEC territory office?
  - a. Before the end of the tax season
  - b. Within 30 days
  - c. Immediately or by the next business day
  - d. At the end of the calendar year
6. 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).
  - a. True
  - b. False

7. Which action is prohibited under the Volunteer Standards of Conduct?
- a. Verifying a taxpayer's identity before preparing a return
  - b. Using information gained from a taxpayer to market your private business
  - c. Asking questions to clarify inconsistent information
  - d. Explaining a taxpayer's rights and responsibilities
8. Which two quality review methods are approved for reviewing returns prepared at a VITA/TCE site?
- 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
9. All questions and answers on pages 1 through 3 of the Form 13614-C, Intake/Interview and Quality Review Sheet must be confirmed with the taxpayer and notated.
- a. True
  - b. False
10. 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
11. If Form 13206 is not available at the site, what must the site coordinator be able to provide?
- a. Name badges with certification levels printed on them
  - b. A method to track volunteer certification levels and provide the information upon request
  - c. A list of returning volunteers
  - d. A copy of volunteers' driver's license
12. Which of the following courses qualify as specialty federal tax law courses for Continuing Education (CE) credit?
- a. Military
  - b. Site Coordinator
  - c. Intake Interview & Quality Review
  - d. Basic
13. The \_\_\_\_\_ must maintain the approved security plan for each site.
- a. The territory office
  - b. The VITA/TCE site
  - c. The partner office
  - d. SPEC headquarter's office

- 14.** 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
- 15.** 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
- 16.** Which of the following is the responsibility of both the preparer and quality reviewer when completing a prior year return?
- a.** Filing the return electronically without review
  - b.** Referring to the applicable prior year Form 13614-C
  - c.** Creating a new tax law publication
  - d.** Determining site operating hours
- 17.** 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
- 18.** 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
- 19.** 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
- 20.** Which action demonstrates due diligence by a VITA/TCE volunteer?
- a.** Accepting all taxpayer information without asking any questions
  - b.** Requesting documentation for every item reported on the return
  - c.** Asking the taxpayer to clarify information that appears inconsistent or incomplete
  - d.** Referring all unusual situations to the site coordinator without taxpayer discussion

## 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. A volunteer may begin site coordinator duties before passing the Site Coordinator certification in Link and Learn Taxes.
  - a. True
  - b. False
3. Publication 5166, VITA/TCE Volunteer Quality Site Requirements, is the primary IRS resource for coordinator roles and responsibilities.
  - a. True
  - b. False
4. 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. Identity, name and address using 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
5. 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
6. According to QSR #4 Reference Materials, VITA/TCE Volunteer Tax Alerts and Quality Site Requirement 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

7. Using information gained from taxpayers at a site to market your private business is a violation of the standards of conduct.
- a. True
  - b. False
8. The acceptable types of quality review at VITA/TCE sites are: Designated Review, Peer-to-Peer Review, and Self-Review.
- a. True
  - b. False
9. All questions on pages 1 through 3 of Form 13614-C, Intake/Interview and Quality Review Sheet must be:
- a. Confirmed with the taxpayer
  - b. Verified for certification level
  - c. Addressed and notated on Form 13614-C
  - d. All of the above
10. 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
11. If Form 13206 is not available at the site, the coordinator must be able to provide a method to track volunteer certification levels and provide the information upon request.
- a. True
  - b. False
12. The International Test is a qualifying certification for receiving Continuing Education Credits.
- a. True
  - b. False
13. Form 15272, VITA/TCE Security Plan, must be approved annually and maintained at the the local SPEC territory office.
- a. True
  - b. False
14. 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

15. 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
16. When completing a prior year tax return both the preparer and quality reviewer must:
- a. Refer to the applicable prior year Form 13614-C
  - b. Use only the current year's tax forms
  - c. Determine site operating hours
  - d. Skip the interview process
17. 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 in a manner that could be overheard by someone else.
- a. SSNs
  - b. Addresses
  - c. Bank account numbers
  - d. All of the above
18. Volunteers who violate the Volunteer Standards of Conduct or commit certain unethical actions, may be added to the Volunteer Registry and removed from the VITA/TCE program indefinitely.
- a. True
  - b. False
19. 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
20. IRS-certified volunteers may rely in good faith on information provided by a taxpayer, but they must ask questions if the information appears inconsistent, incomplete, or questionable.
- a. True
  - b. False