Tax Volunteer Onboarding Timeline

This is a projected timeline to inform your planning and volunteer onboarding. Timeline may vary by person and situation. Thank you for your interest in Pisgah Legal Services.

Process or Event	Time to Complete	Date when available
Review Tax Volunteer Job description and fill out volunteer application if interested.	About 15 minutes to complete.	Anytime
Volunteer coordinator will reach out to schedule and complete "interview" with applicant. (Talk about any potential conflicts of interest)	~30 min.-1 hour	Anytime
Sign PLS Confidentiality agreement and Background check authorization form and return to volunteer coordinator. (Volunteer coordinator will send these forms to you)	Few minutes	Anytime
Create account through Link & Learn and begin working on exams for VITA certification.	~5-15 hours	Anytime (except October-December when the IRS is updating their site)
Once certified, shadow at least two tax clinics, or as many as needed until comfortable and approved by site coordinator to prepare tax returns.	~ 6 hours (Each clinic is usually 3+ hours)	Anytime, set up by Volunteer Coordinator and Site Coordinator.
Attend annual trainings as scheduled.	~8 hours	Usually in January
Attend Monthly Meetings	1 hour	First Friday of every month 12pm-1pm
Review weekly newsletter	Few minutes	Every Friday

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