



2023-2024 TRAINING & CERTIFICATION STEP BY STEP GUIDE

Thank you for volunteering for the IRS VITA (Volunteer Income Tax Assistance) program. You will have a huge positive impact in the lives of many of our region's hardworking families.

HOW TO USE THIS GUIDE: Read through the entire packet *before* getting started. Then, go back and reference each section as you work through the steps.

If at any point you have questions, get stuck, or need help, **PLEASE** contact the VITA Coordinator.

Catherine Blankensop
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(812) 269-1244



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South Central Indiana



Tips before you get started!

✓ STAY POSITIVE !!!!



There is a lot to learn, and a lot of training to get through, just remember to always keep your eye on the end goal- the amazing impact you will have on people's lives. It's a great feeling and a rewarding experience!

✓ DON'T MEMORIZE, PROBLEM SOLVE.

There is WAY too much information to try and retain it all, and it's not necessary. Get familiar with your resources so you know where to find the information you need. Then you can reference it when it comes up, either on the test or on a real - life tax return.

✓ ASK FOR HELP- EARLY AND OFTEN

There is no reason to struggle alone, there are lots of resources and people to help you get through this process!

Training & Certification Guide

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Free Community Tax Service Volunteer Positions



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Intake Specialists

- Welcome taxpayers to the site and thank them for coming
- Administer the IRS Intake Form to taxpayers and help with any questions
- Assure that each taxpayer has all required information to receive service
- Assign each taxpayer to an available and appropriate preparer

Certified Tax Preparers

- Complete tax returns for taxpayers (Typically 1040 or 1040-EZ)
- Answer taxpayers' questions politely and confidentially
- Adhere to the Internal Revenue Service policies, procedures, and guidelines
- Perform Quality Review on other tax preparers' completed forms (at the level to which you are certified)

Lead Tax Preparers

- Position only available to returning tax preparers with advanced certification
- Same responsibilities as certified tax preparers
- Additionally:
 - Training new tax preparers and intake specialists in how to assist taxpayers
 - Working with site coordinators to take on additional responsibilities to ensure a smooth process

New Link and Learn Site

In November 2023, the IRS released a new Link and Learn site: <https://linklearntaxescertification.com/>. This is a **different** URL than in past years.

Link and Learn is the site where you can access the certification tests to prepare to be VITA volunteers. You will learn more about it in this guide.

At the time of writing this guide, December 8, 2023, **the new Link and Learn site is still under maintenance**. It is scheduled to be finished on December 11. Additional maintenance may occur between now and the tax season. We will be sure to share important information with you.

All study materials are available for you now, and will continue to be accessible. However, you will not be able to take the certification tests while the site is under maintenance. We encourage you to begin studying now. All courses, guides, and study materials references in this guide **are** available now. All hyperlinks and images are up to date.

We will email you as soon as the Link and Learn site is up. You can also check back regularly on your own. Once it is up and running properly, you will be able to take your certification tests.

Step 1: Enrollment



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1. Application: If you have not already filled out the VITA Application online, please do so as soon as possible. This is how we track volunteer communication and participation.

[Application 2023-2024](#)

2. Create an account on the Testing Platform: Visit the IRS' training and certification site, called "Link and Learn" at <https://linklearntaxescertification.com/>

Additional help on navigating Link and Learn for study and testing is in the Getting-Started Tutorial on central panel of the page.

Under Certification Tests, **Create an Account** with Login and Password if you do not already have one. If you volunteered last year, your account will still exist, and you can use the same login. Write down your login information on the last page of this guide!

****If you need more information about how to create an account and get started with Link and Learn, see the [Getting Started Guide](#)**

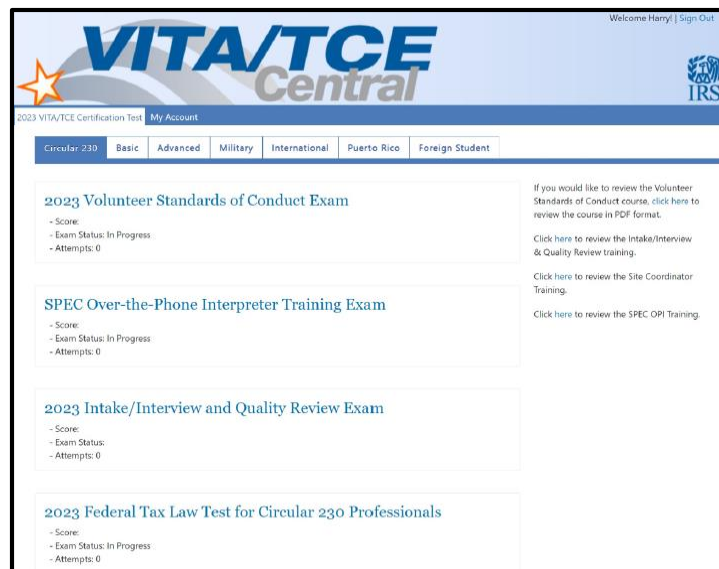
Step 1: Enrollment- Continued

3. Volunteer Standards of Conduct Test: The Volunteer Standards of Conduct (VSOC) Exam is a prerequisite to all other courses. This information is mandatory for all VITA volunteers, and you may not proceed to any other exams until you pass this one. The full [Volunteer Standards of Conduct Pub 4961](#) is available under Quick Links menu on the right side of the VITA/TCE Central login page.

- To take the VSOC Test: In the first column, under the heading “Course name,” click on the link for Volunteer Standards of Conduct – Exam. This opens a description dialog box. Within this window, click Launch on the upper right to start the exam and complete your Volunteer Standards of Conduct (VSOC) Test.

4. Intake/Interview and Quality Review Test: Return to the IRS’ training site VITA/TCE Central <https://linklearntaxescertification.com/> On the right side, view the PowerPoint slideshow for Intake Interview and Quality Review.

- To take the test: log in with your username and password at VITA/TCE Central <https://linklearntaxescertification.com/>. In the left-hand column, select the “Intake Interview and Quality Review” Launch and take the Intake and Quality Review test.
- For all tests, the test platform looks like this:



Once you finish the test, You have completed Step One and enrolled as a Volunteer! Take a screenshot of your VITA dashboard and email it to catherine@monroeunitedway.org.

For Intake Specialists: Congratulations, you are finished with your training! Print your volunteer agreement and email it to catherine@monroeunitedway.org (See page 8 for detailed instructions on how to print the agreement)

Certified and Lead Preparers: Move on to step 2 if you wish to become a Certified or Lead Tax Preparer.

Step 2: Tax Prep Training for Certified and Lead Tax Preparers

1. Review the Link and Learn Training Modules on each tax topic for the test you are planning to take. The [VITA Site Map](#) has a list and links to all the topics for each test.

*Note: there are **6 additional topics** under the Advanced test. We highly encourage everyone to take the Advanced test, because we see these tax scenarios commonly at our tax sites. **If you take the Advanced test, you do not need to also take the basic test. It is included in the Advanced test.**

Basic Menu:

[Important Changes This Year](#)
[Course Introduction Workout](#)
[Filing Basics Workout](#)
[Filing Status Workout](#)
[Personal Exemptions Workout](#)
[Dependents Workout](#)
[Unique Filing Situations Workout](#)
[Income — Wages, Interest, etc. Workout](#)
[Income — Retirement Income Workout](#)
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[Social Security Workout](#)
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[Standard Deduction and Tax Computation Workout](#)
[Credit for Child and Dependent Care Expenses Workout](#)
[Education Credits Workout](#)
[Child Tax Credit Workout](#)
[Miscellaneous Credits Workout](#)
[Other Taxes Workout](#)
[Payments Workout](#)
[Earned Income Credit \(EIC\) Workout](#)
[Refund and Amount of Tax Owed Workout](#)
[Completing the Return](#)
[Amended and Prior Year Returns Workout](#)

Advanced Menu:

[Important Changes This Year](#)
[Course Introduction Workout](#)
[Premium Tax Credit Workout](#)
[Filing Basics Workout](#)
[Filing Status Workout](#)
[Personal Exemptions Workout](#)
[Dependents Workout](#)
[Unique Filing Situations Workout](#)
[Income — Wages, Interest, etc. Workout](#)
[Income — Business Workout](#)
[Income — Capital Gain or Loss Workout](#)
[Income — Retirement Income Workout](#)
[Schedules K-1 and Rental Income Workout](#)
[Income — Unemployment Compensation](#)
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[Refund and Amount of Tax Owed Workout](#)
[Completing the Return](#)
[Amended and Prior Year Returns Workout](#)

Step 2: Tax Prep Training for Certified and Lead Tax Preparers- Cont.

2. View online Tax Preparation training videos OR Attend an in- person training

Training will be a mix of in person events and virtual training opportunities in 2023-2024. Virtual training videos will be posted online at our [Volunteer Hub](https://www.unitedwaysci.org/VolunteerHub) (<https://www.unitedwaysci.org/TaxHero>). In-person trainings will be held at United Way of Monroe County and Ivy Tech's Bloomington Campus. Please fill out [this RSVP form](#) to be added to the Outlook Calendar invites.

In-Person Training Dates:

Thursday, December 7, 7 - 8pm – Working With Taxpayers 101

- This training will be live streamed. The link is available in the Outlook Calendar invite.

Tuesday, January 9, 7 - 8pm – Volunteer Kick-Off meeting
(United Way: 431 S. College Ave., Bloomington)

- This meeting will be live streamed. The link is available in the Outlook Calendar invite.

Saturday, January 13, 9 am - 1pm – Tax & Software
(Ivy Tech: 200 Daniels Way, Bloomington)

- This training will also be live streamed at the following link:
 - <https://ivytech.zoom.us/my/tina.sherrard>

Training Descriptions

Working with Taxpayers 101

This quick class will inform volunteers how to work with all types of taxpayers, especially while handling sensitive information. This class is useful to help you feel comfortable when you first sit down to work one on one with taxpayers.

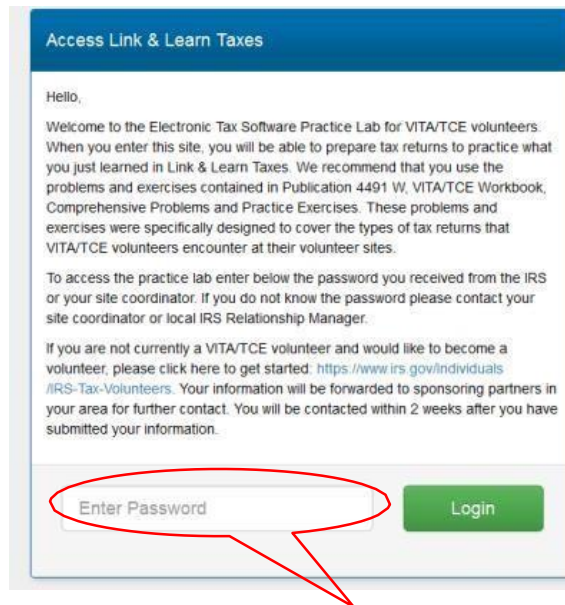
Tax & Software Class

Ivy Tech Accounting and Tax Professors host two classes, one that covers the basics of tax law, how to pass the certification test, and the second on how to use TaxSlayer-the IRS provided tax software you will use to prepare returns during tax season.

Step 2: Tax Prep Training for Certified and Lead Tax Preparers- Cont.

3. Practice doing returns: Use the TaxSlayer Practice Lab

<https://vita.taxslayerpro.com/IRSTraining> to practice the software and to complete tax returns for your test.



Access Link & Learn Taxes

Hello,

Welcome to the Electronic Tax Software Practice Lab for VITA/TCE volunteers. When you enter this site, you will be able to prepare tax returns to practice what you just learned in Link & Learn Taxes. We recommend that you use the problems and exercises contained in Publication 4491 W, VITA/TCE Workbook, Comprehensive Problems and Practice Exercises. These problems and exercises were specifically designed to cover the types of tax returns that VITA/TCE volunteers encounter at their volunteer sites.

To access the practice lab enter below the password you received from the IRS or your site coordinator. If you do not know the password please contact your site coordinator or local IRS Relationship Manager.

If you are not currently a VITA/TCE volunteer and would like to become a volunteer, please click here to get started: <https://www.irs.gov/individuals/IRS-Tax-Volunteers>. Your information will be forwarded to sponsoring partners in your area for further contact. You will be contacted within 2 weeks after you have submitted your information.

Enter Password Login

The Access Code to Log in is **TRAINPROWEB**. This takes you to a page where you *set up a username and password* for the practice lab. There are lots of helpful videos and resources at this site.

[For more information on Using the Practice Lab, read "Using the Practice Lab Guide."](#)**

- ❖ Use the sample return scenarios in your testing materials in pub 6744 on page 40-48 to practice entering information into TaxSlayer practice lab. You'll have to make up the SSN's, but everything else is provided.

Step 2: Tax Prep Training...Cont.



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4. Get ready to test: Practice your tax knowledge by completing the Basic Tax Certification test in the [test booklet \(Pub 6744\)](#) and the TaxSlayer practice lab.

***NOTE:** You can use Pub 6744 to complete the test questions now so you can just fill them in later for the online test!

This helps you identify topics where you need additional training. The test scenarios are designed to test your ability to apply tax law; they are often more challenging than returns you'll see at a tax site. ***Don't get discouraged!***

PRO TIP! Vitaresources.net is a wonderful site that has loads of helpful tutorials by topic, and [Practice Tests!](#) The practice tests are Google forms that you can take as many times as you want, and they will give you instant feedback on what you got right and wrong.

When you identify trouble topics:

- ✓ Use your reference materials! The IRS [Pub 4491](#), [Pub 6744](#), and [Pub 4012](#), are your best resources.
- ✓ Study using IRS' Link and Learn training site for individual interactive lessons on tax topics. (You do not need a password for these lessons.) The lessons will refer frequently to a written curriculum, Publication 4491, which is only available in pdf form online.
- ✓ Visit vitaresources.net and visit the page related to those topics
- ✓ Contact VITA Coordinator(s); we can help set you up with a training buddy to work through more difficult problems.

5. Complete the retest questions in the IRS Publication 6744. Are you ready? If not, go back and study more. Ask for help.

6. Required for Lead Preparers, highly encouraged for other Preparers: Continue on to Advanced Training Materials and use the same guidance listed above to complete the Advanced Tax Certification Test in the test booklet.



*You have completed Step Two; you are ready to **take the Certification Tests!** Move on to step 3.*

Step 3: Certification



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IRS Volunteer Certification uses the **Link and Learn Central Testing Site** <https://linklearntaxescertification.com/>

- All Certified Tax Preparers are required to at least pass the Basic Test
- All Certified Tax Preparers are **highly encouraged to take the Advanced Test**, returning volunteers are required to certify Advanced.
- Lead Preparers are required to take the Advanced Tests.

Each certification test requires the volunteer to complete a tax return and answer questions based on the results. The tests are split up by level- Basic and Advanced. **REMEMBER: IF YOU ARE CERTIFYING AS ADVANCED YOU ONLY NEED TAKE THE ADVANCED TEST; YOU DO NOT NEED TO TAKE BOTH.**

Test tips:



- Take your time and use your reference materials. **The test is open-book and is not timed.** This test is not about memorization but about your ability to research and apply information.
- Use the [practice tests](#) to feel confident you will pass before you try it in Link and Learn.
- The test scenarios are designed to test your ability to apply tax law; they are often more challenging than returns you'll see a tax site.
- You can take the practice test as often as you like, but you have to complete the online link n learn test to certify.
- Each test can be taken up to two times. You must achieve an 80%. If you fail the test the first time, look over the test summary, which will tell you the areas you answered incorrectly. You can study these in Link and Learn before taking the test again.

Step 3: Certification- Continued

Take the test:

**NOTE: If you have completed the written test in the test booklet in step 2, you will simply enter your answers into the Online Test.*

- Sign on to the test at the Link and Learn Testing site.
- Select the appropriate exam in the first column of the screen; a new box will open. Then click Launch.
- Enter the answers to the test questions using the returns you have completed. Be sure to read the test on the screen- sometimes question and answer order can differ from the information in the test booklet.
- After clicking Submit, the Certification Test Results screen will be displayed. On this screen, you can view:
 - o Your score (at the bottom of the screen). Passing score is **80%**.
 - o The result for each question.
 - o Feedback for incorrect questions, along with links to the Link & Learn Taxes lesson with the information needed to answer the test question. This is your personalized review lesson; use these links to study specific content as needed.

After you complete your tests, your certification screen will update to show that you are certified as a tax preparer. You can return to this screen at any time to pull up documentation on which tests you have taken.



Step 4: Indiana Volunteer Handbook

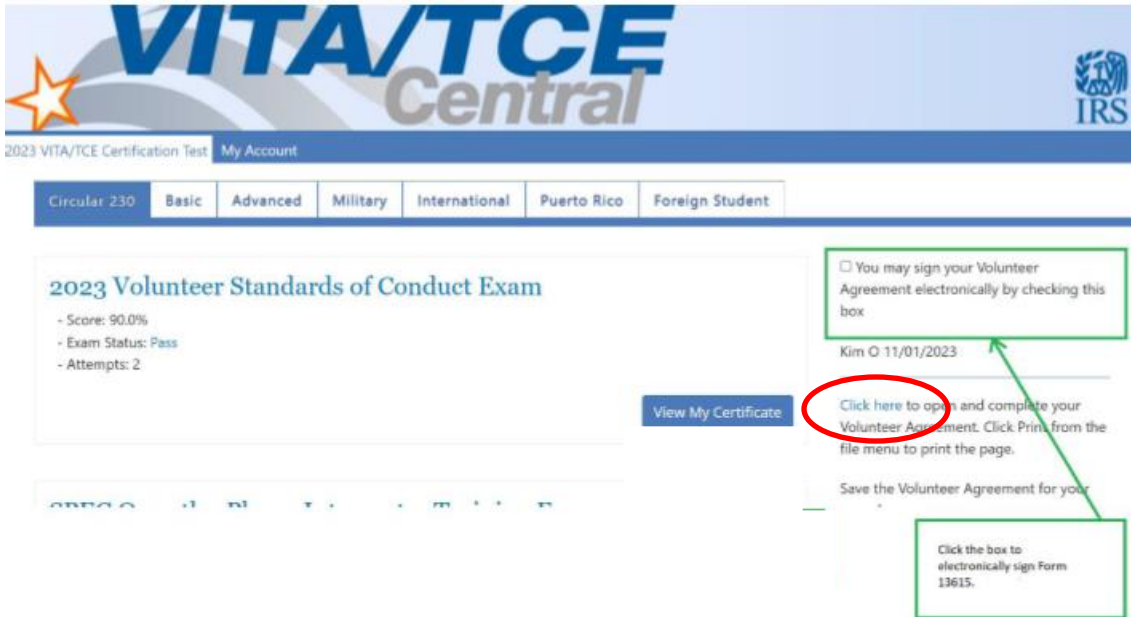
- ❖ Although there is no test on Indiana state reviews, the State Department of Revenue publishes a guide each year to help volunteer preparers with accurately preparing state returns.
- ❖ The guide is relatively short and has good information which will help you prepare accurate state returns.

Please go to the [Indiana DOR Volunteer Tax Preparers webpage](#) and read through the Indiana Volunteer Handbook carefully. (Not updated for Tax Year 2023 as of December 4, 2023. Please ensure it is updated before reading through it.)



Step 5: Print Volunteer Agreement Form

1. On the right side of the certification page, **click the check-box** next to the statement, “You may sign your Volunteer Agreement electronically by checking this box.”



2. Open and print the volunteer agreement form ("click here" that is circled in red). This form documents each test that you have passed; bring it with you to the tax site when you volunteer. Your Site Coordinator needs to retain a copy on site during tax season per IRS requirements.

3. Email the VITA Coordinator a copy of your volunteer agreement form.



Congratulations, you are a certified tax preparer! Time to Celebrate!!!!



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VITA Training Links and Passwords

IRS Training and Certification

<https://linklearntaxescertification.com/>

Username _____

Password _____

PracticeLab-

<https://vita.taxlayerpro.com/IRSTraining>

Practice Lab Login Access: TRAINPROWEB

Username _____

Password _____

REMEMBER: If at any point you have questions,
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