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 VITA Coordinator Amy Leyenbeck: amy@monroecountymonroeunitedway.org; 812-334-8370 X11.
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

**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
Step 1: Enrollment

1. **Application**: If you have not already filled out the VITA Application online, please do so as soon as possible.

[Application 2019]

2. **Create an account on the Testing Platform**: Visit the IRS’ training and certification site, called “Link and Learn” at [https://www.linklearncertification.com](https://www.linklearncertification.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, [Getting Started Job Aid](#).**
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 http://www.linklearnerteacher.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 www.linklearnerteacher.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 amy@monroeunitedway.org.

For Intake Specialists: Congratulations, you are finished with your training! Print your volunteer agreement and email it to amy@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 only 4 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.

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2. **Attend (Optional) Tax Preparation classes.**

The Free Community Tax Service offers several in person training opportunities. These are free classes that will help you learn the basics to pass the test. They are highly recommended, but attendance is not required to volunteer.

Details about the logistics of where and when these classes are held is presented towards the end of this packet, and at the online Free Community Tax Service Volunteer Hub (https://www.monrounitedway.org/TaxHero). The VITA Coordinator will keep you updated if the class schedule has changed.

**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 Law Class**

Ivy Tech Accounting and Tax Professors host a free class at three different times for your convenience. They will lead you through the basics of tax law and how to pass the certification test.

**TaxSlayer software Training**

Ivy Tech Professors host a free class, at three different times for your convenience, to walk you through how to use TaxSlayer—the IRS provided tax software you will use to prepare returns during tax season.

**Group Study Sessions**

Volunteers are invited to join us for a group study session where Site Coordinators and experienced volunteers will be on hand to help you find the information you need to answer difficult questions and clarify any topics that you are struggling with. Check the training schedule page or the **Online Volunteer Hub** for details about where/when study sessions will be held.

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.

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 to practice entering information into TaxSlayer practice lab.

They can also be found online here: https://www.linklearncertification.com/DesktopModules/Documents/ViewDocument.aspx?AddToLog=1&DocumentID=996

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!*

When you identify trouble topics:

✓ Use your reference materials! The IRS Pub 4491, Pub 6744, and Pub 4012, available online and limited hard copies available for pick up at United Way’s Office, 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 available in pdf form online; in each lesson there will be a link on the right of the screen which links to the appropriate pages in Publication 4491.

✓ 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

IRS Volunteer Certification uses the Link and Learn Central Testing Site [https://www.linklearncertification.com](https://www.linklearncertification.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 and HSA, returning volunteers are required to certify Advanced.
- Lead Preparers are required to take the Advanced and HSA 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 THE BASIC AND ADVANCED.**

**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.
- 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 it is not an applicable test for certification.
- Additional information about moving through the test screens online is available in the “Getting Started Tutorial” listed in the bottom center panel of the link and learn site.
- 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 & ACA Training Review

- 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. Please read this Volunteer Handbook carefully.

- Below are links to the Health Reform Beyond the Basics website slide decks for this year's ACA training. These slides are helpful to understand what tax preparers need to know in regard to the ACA.

http://www.healthreformbeyondthebasics.org/ty2018-reconciling-premium-tax-credit/

http://www.healthreformbeyondthebasics.org/ty2018-exemptions-individual-mandate/
Step 5: Print Volunteer Agreement Form

1. Open and Complete the Form 13615, Volunteer Agreement, which shows that you have passed all tests and agree to the rules of the program.

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

![Image of certificate with checkboxes]

2. **Open and print the volunteer agreement form.** 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.

   ![Image of certificate with green check]

   ![Image of certificate with red x]

   **Congratulations**, you are a **certified tax preparer! Time to Celebrate!!!!!**
2019-2020 VITA Training Schedule

**Working with Taxpayers 101**
Maurer School of Law, 211 S. Indiana Ave. Bloomington,
Room 125  Tuesday November 19- 6pm-7pm

**Volunteer Kick Off Meeting- Broadview, Ellettsville, City Hall, SCCAP sites**
Showers Building (City Hall) 401 N. Morton St. Bloomington
McClosky Room, Monday January 13th 6-7 pm

**Volunteer Kick Off Meeting- Maurer, Chinese Student and Stone Belt sites**
Maurer School of Law, 211 S. Indiana Ave. Bloomington,
Room TBD, Tuesday January 14th, 6-7 pm

**Tax Law Training Class**
Ivy Tech; 200 Daniels Way, Room B201
Friday January 17- 9am-12pm,
Friday January 17- 1pm-4pm,
Saturday January 18- 9am-12 pm
(OONLY NEED TO ATTEND ONCE, THE SAME SESSION IS REPEATED 3 TIMES FOR YOUR CONVENIENCE)

**TaxSlayer Software Training Class**
Ivy Tech; 200 Daniels Way, Room B201
Friday January 24- 9am-12pm,
Friday January 24-1pm-4pm,
Saturday January 25- 9am-12 pm
(OONLY NEED TO ATTEND ONCE, THE SAME SESSION IS REPEATED 3 TIMES FOR YOUR CONVENIENCE)

**Group Study Sessions:**
TBD: *Check the volunteer hub website for group study sessions,
and VITA coordinator will email you with the details once they have been confirmed.

[Click here to RSVP](#) for all training sessions you plan to attend
VITA Training Links and Passwords

**IRS Training and Certification**
[www.linklearncertification.com](http://www.linklearncertification.com)
Username ________________________________
Password ________________________________

**PracticeLab**
[https://vita.taxslayerpro.com/IRSTraining](https://vita.taxslayerpro.com/IRSTraining)
Practice Lab Login Access: TRAINPROWEB
Username ________________________________
Password ________________________________