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@monroeunitedway.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 its 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
Table of Contents

• Free Community Tax Service Volunteer Positions
• Training and Certification Requirements by position
• Step 1: Enrollment
• Step 2: Tax Prep Training
• Step 3: Certification
• Step 4: Indiana State return & ACA
• Step 5: Print your agreement form
• VITA training links and password keeper
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. This is how we track volunteer communication and participation.

   [Application 2020-2021]

2. **Create an account on the Testing Platform:** Visit the IRS’ training and certification site, called “Link and Learn” at [https://www.linklearnertecertification.com](https://www.linklearnertecertification.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](https://example.com).**
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.linklearncertification.com](http://www.linklearncertification.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.linklearncertification.com](http://www.linklearncertification.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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**Basic Menu:**

- What's New This Year
- Course Introduction Workout
- Affordable Care Act Workout
- Filing Basics Workout
- Filing Status Workout
- Personal Exemptions Workout
- Dependency Exemptions Workout
- Unique Filing Status and Exemption Situations Workout
- Income Workout
  - Income — Retirement Income Workout
  - Income — Unemployment Compensation
  - Social Security Benefits Workout
- Other Income, Form 1040 Line 21 Workout
- Adjustments to Income Workout
- Standard Deduction and Tax Computation Workout
- Itemized Deductions 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
- Health Savings Accounts (HSA)

**Advanced Menu:**

- What's New This Year
- Course Introduction Workout
- Affordable Care Act Workout
- Filing Basics Workout
- Filing Status Workout
- Personal Exemptions Workout
- Dependency Exemptions Workout
- Unique Filing Status and Exemption Situations Workout
- Income Workout
  - Income — Business, Form 1040, Line 12 Workout
  - Income — Capital Gain or Loss Workout
  - Income — Retirement Income Workout
  - Schedules K-1 and Rental Income Workout
  - Income — Unemployment Compensation
  - Social Security Benefits Workout
- Other Income, Form 1040 Line 21 Workout
- Adjustments to Income Workout
- Standard Deduction and Tax Computation Workout
- Itemized Deductions Workout
- Credit for Child and Dependent Care Expenses Workout
- Education Credits Workout
- Foreign Tax Credit 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
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- Health Savings Accounts (HSA)
2. View online Tax Preparation training videos.

In 2020-2021 all our training opportunities will be videos posted online at our Volunteer Hub (https://www.monrounitedway.org/TaxHero).

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.
3. **Practice doing returns**: Use the TaxSlayer Practice Lab [https://vita.taxslayerpro.com/IRSTraining](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 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.

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](#), 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.

   ✓ 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**, 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 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.

- 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:
  - Your score (at the bottom of the screen). Passing score is 80%.
  - The result for each question.
  - 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 Volunteer Hub and read through the Indiana Volunteer Handbook carefully.
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 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.”

![Score table]

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.

⭐️ **Congratulations, you are a certified tax preparer! Time to Celebrate!!!!!**
VITA Training Links and Passwords

IRS Training and Certification
www.linklearncertification.com
Username ____________________________
Password ____________________________

PracticeLab-
https://vita.taxslayerpro.com/IRSTraining
Practice Lab Login Access: TRAINPROWEB
Username ____________________________
Password ____________________________

REMEMBER: If at any point you have questions, get stuck, or need help

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