



VITA/TCE Training

Practice Lab

Using the Practice Lab

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Using the Practice Lab

After completing this topic, you will be able to:

1. Navigate to the Practice Lab.
2. Create a Practice Lab login.
3. Retrieve a lost user name.
4. Reset a password.
5. Start a return in Practice Lab.

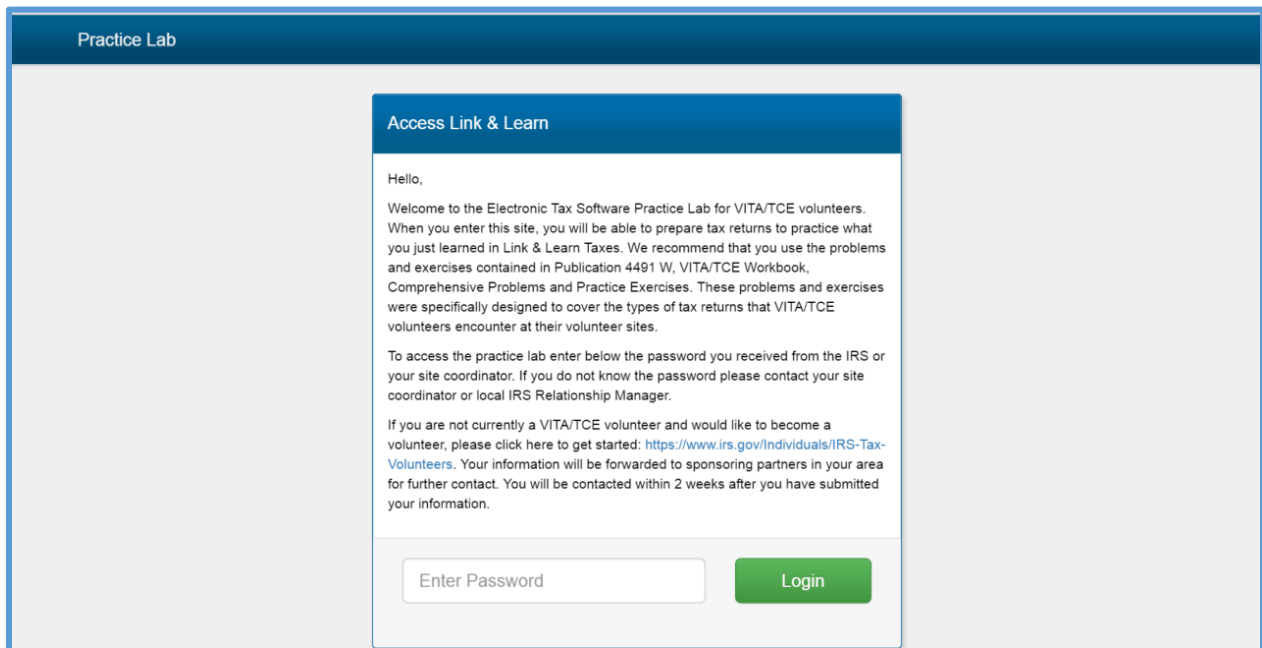
TaxSlayer provides an environment in which you can prepare training returns. You can practice in TaxSlayer Pro Online to be fully prepared for tax season. Take the tax law certification courses in Link & Learn Taxes and then practice preparing returns.

Creating a Login

Before you can start working in the Practice Lab, you need to create a login. To create a login, use the following steps:

1. Navigate to the Practice Lab in your browser:
<https://vita.taxslayerpro.com/IRSTraining>.

Your browser displays the Practice Lab page:



Practice Lab

Access Link & Learn

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.

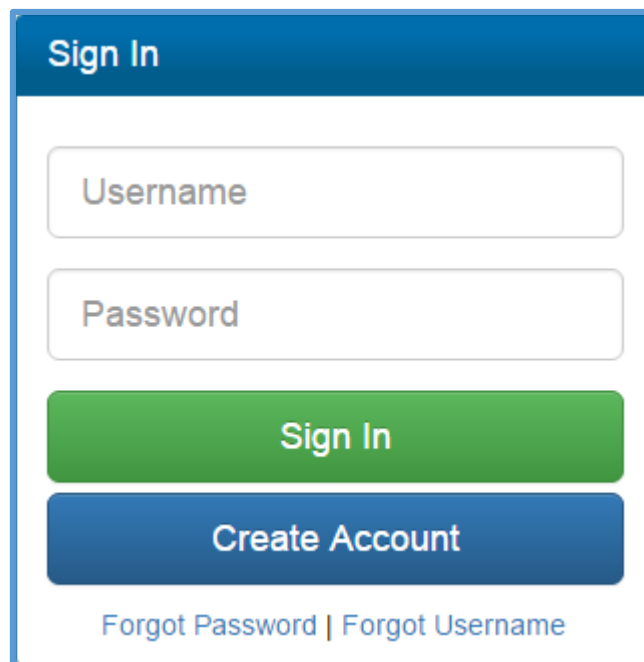
Enter Password

Login

If you are not currently a VITA/TCE volunteer and would like to become a volunteer, please navigate to <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.

2. Using the generic password that your SPEC Relationship Manager or Site Coordinator provides, type the password.
3. Click **Login**.

Practice Lab displays the **Sign In** page:



The image shows a 'Sign In' page with a blue header. Below the header are two input fields: 'Username' and 'Password'. Below these fields are two buttons: a green 'Sign In' button and a blue 'Create Account' button. At the bottom of the page, there are two links: 'Forgot Password' and 'Forgot Username'.

4. Click **Create Account**.

Practice Lab displays the **Create New Account** page:

Practice Lab

Create New Account

Account Information

Email Address
Email Address

Confirm Email Address
Confirm Email Address

Username
Username

Password
Password

Confirm Password
Confirm Password

Program Type
Please Select

Site Identification Number (SIDN)
Site Identification Number (SIDN)

Password Recovery

Security Question

5. In the **Account Information** section, type your email address.

TIP: Practice Lab displays a warning if you have previously used an email address in the Practice Lab system. Make sure you use a unique email address. If you have already set up a user name on the system, and do not remember it, see the *Retrieving a User Name* section later in this lesson.

6. Type the email address again for verification.

7. Create a user name. We recommend that you use either *Train* or *Practice* in the user name.

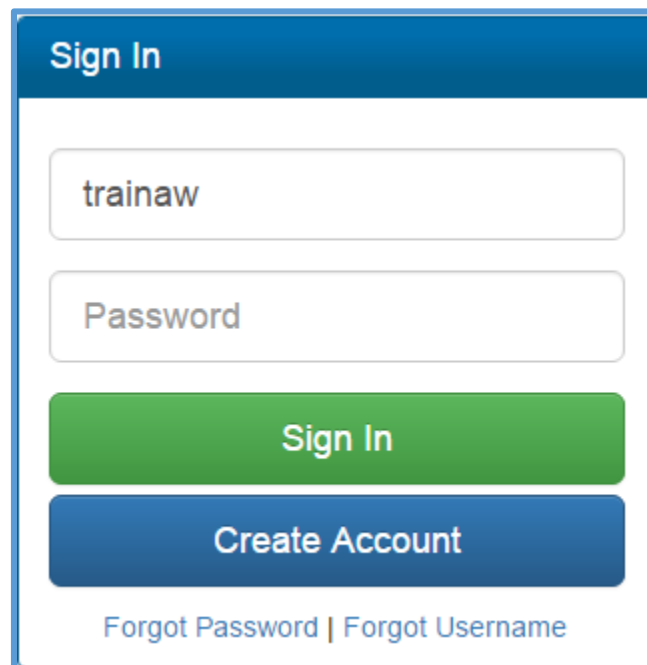
TIP: All user names in TaxSlayer Pro Online must be unique in **all** online platforms. Practice Lab displays a warning if the user name has been created by another volunteer. Do not use a user name that your site administrator may use for you next filing season.

8. Type a password. Use an alphanumeric password containing at least six (6) characters.

9. Type the password again for verification.

10. Select the program type from the drop-down list. You can select one of the following options:
 - a. VITA
 - b. Military VITA
 - c. Co-Located VITA
 - d. TCE (Non-AARP)
 - e. Grant
 - f. AARP Tax-Aide
 - g. FSA Fusion
 - h. FSA Stand-Alone
 - i. FSA Remote
 - j. IRS Employee
 - k. None
11. Type your Site Identification Number (SIDN) if you know it.
12. Select a security question from the list.
13. Type the answer to your security question.
14. Click **Create Account**.

Practice Lab displays the **Sign In** page with your new user name entered:



Sign In

trainaw

Password

Sign In

Create Account

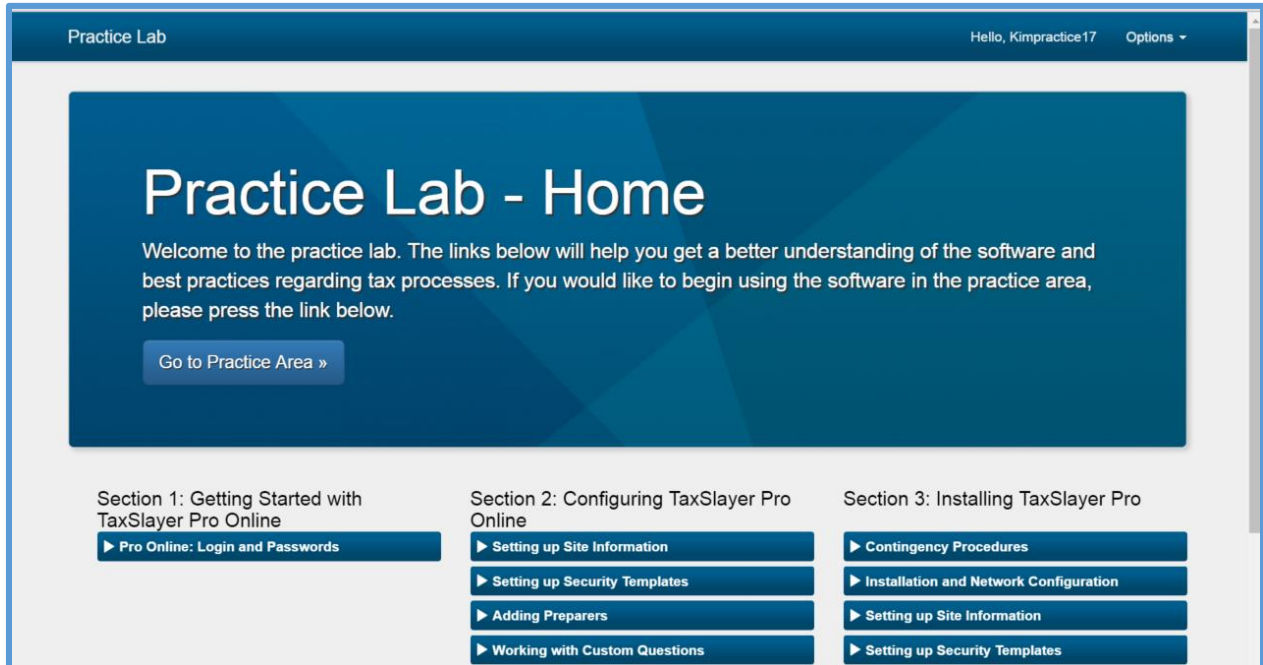
[Forgot Password](#) | [Forgot Username](#)

Signing In

To sign in to Practice Lab, use the following steps from the **Sign In** page.

1. Type the user name and alphanumeric password you created during account setup.
2. Click **Sign In**.

Practice Lab displays the **Practice Lab – Home** page:

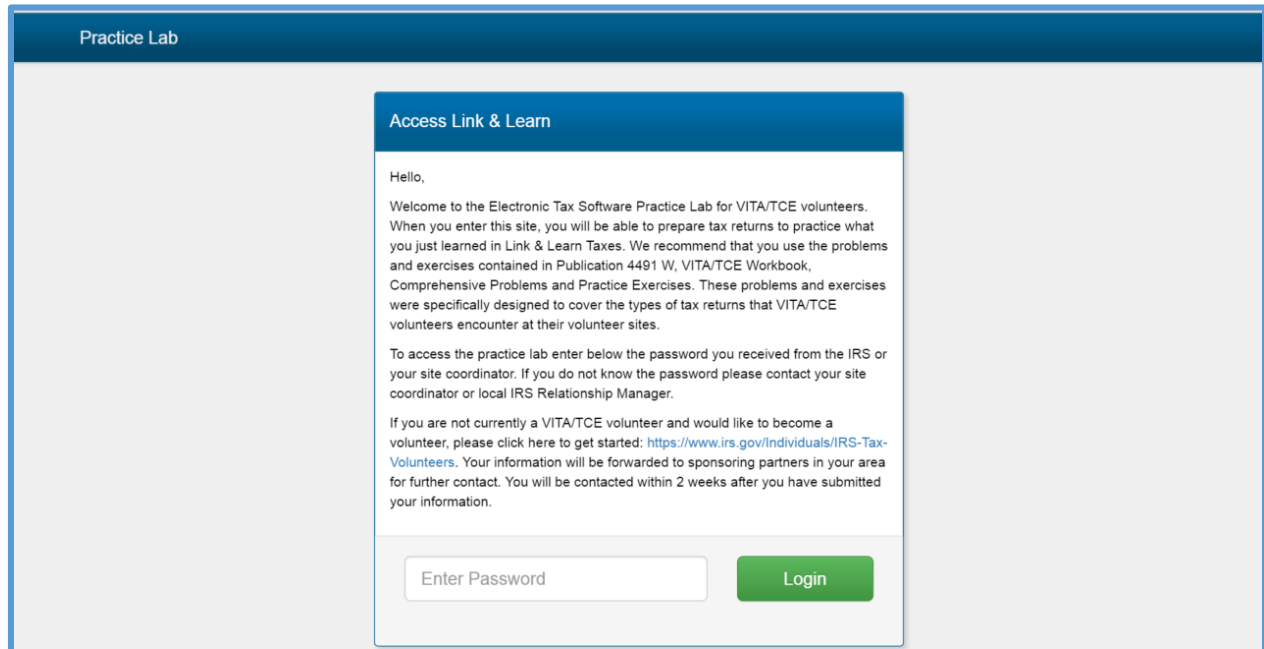


Retrieving a User Name

If you forget your user name, use the following steps to retrieve it:

1. In your browser, navigate to <https://vita.taxslayerpro.com/IRSTraining>.

Your browser displays the Practice Lab page:



The screenshot shows a web page titled "Practice Lab". The main content area is titled "Access Link & Learn". It contains the following text:

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.

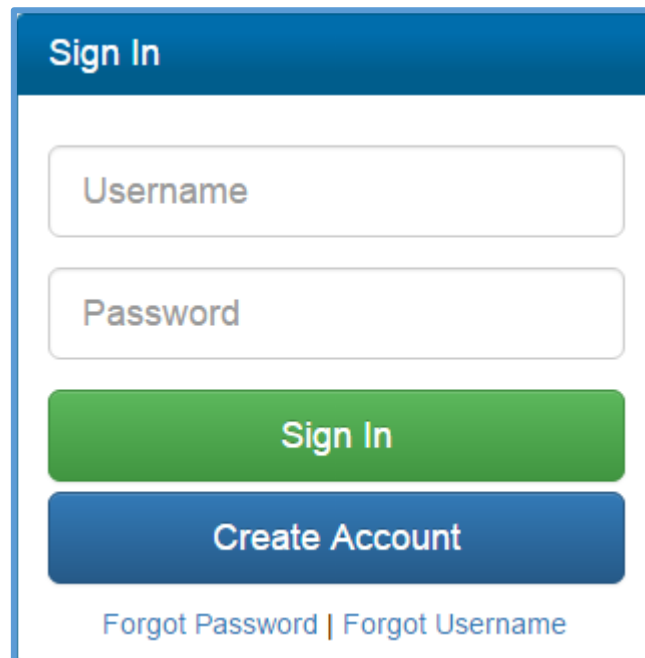
To access the practice lab enter below the password you received from the IRS or your site coordinator. If you do not know the password please contact your site coordinator or local IRS Relationship Manager.

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.

At the bottom of the form, there is a text input field labeled "Enter Password" and a green button labeled "Login".

1. Type the generic password that your SPEC Relationship Manager or Site Coordinator provides.
2. Click **Login**.

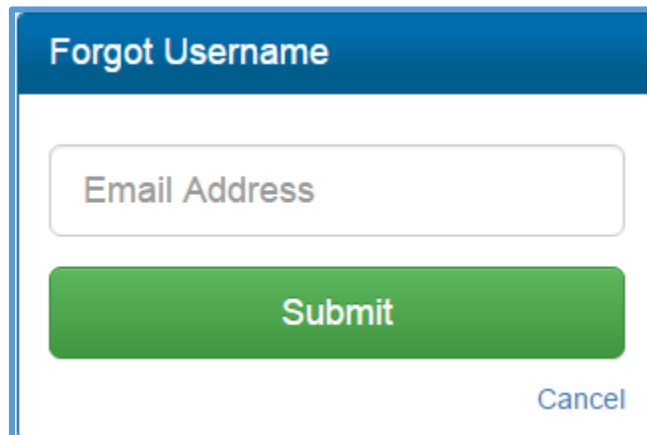
Practice Lab displays the **Sign In** page:



The screenshot shows a "Sign In" page. It features two text input fields: "Username" and "Password". Below these fields are two buttons: a green "Sign In" button and a blue "Create Account" button. At the bottom of the page, there are two links: "Forgot Password" and "Forgot Username".

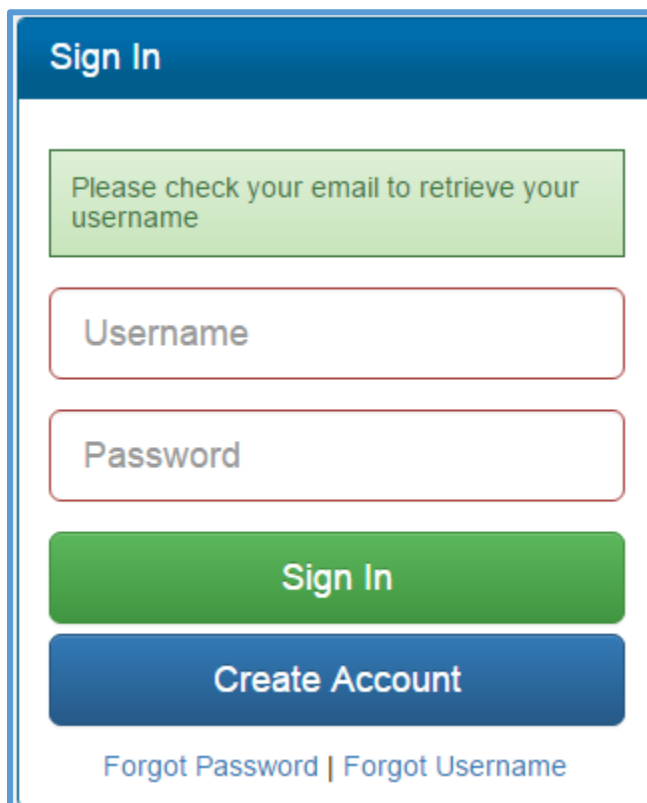
3. Click **Forgot Username**.

Practice Lab displays the **Forgot Username** page:



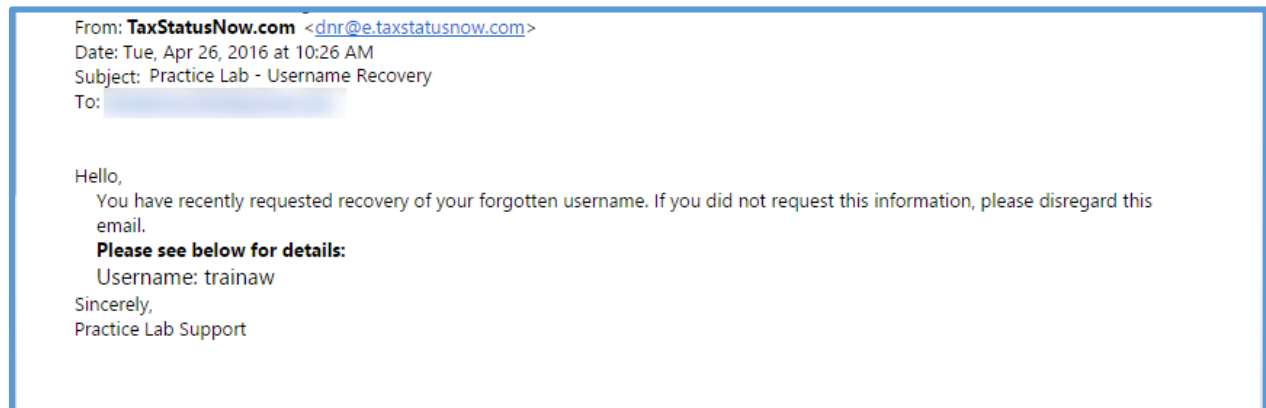
4. Type the email address you used to set up the Practice Lab account.
5. Click **Submit**.

Practice Lab displays the **Sign In** page, with a message that you should check your email for the user name:



6. Find the email from TaxStatusNow.com.

Your email service displays the email:



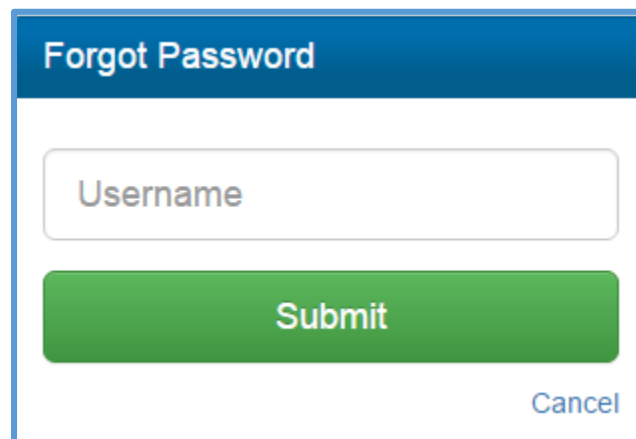
7. Use the user name in the email to sign in to Practice Lab.

Resetting Your Password

If you forget your password, use the following steps from the **Sign In** page:

1. Click **Forgot Password**.

Practice Lab displays the **Forgot Password** page:




The screenshot shows a web form titled "Forgot Password" with a blue header. Below the header is a text input field labeled "Username". Below the input field is a large green button labeled "Submit". In the bottom right corner of the form, there is a blue link labeled "Cancel".

2. Type your user name.

3. Click **Submit**.

Practice Lab displays the **Forgot Password** page with your security question:



Forgot Password

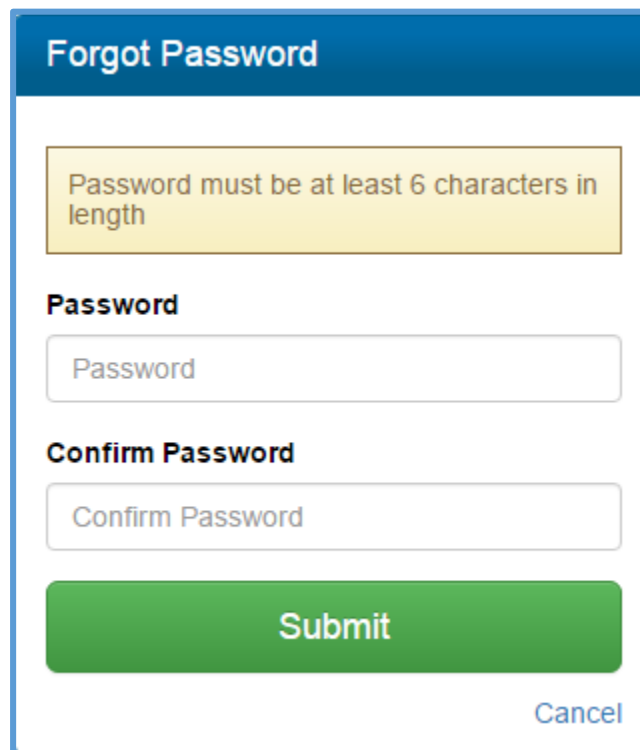
In what city were you born?

Submit

[Forgot Answer](#) [Cancel](#)

4. Type the answer to your security question.
5. Click **Submit**.

Practice Lab displays the **Forgot Password** page to create a new password:



Forgot Password

Password must be at least 6 characters in length

Password

Confirm Password

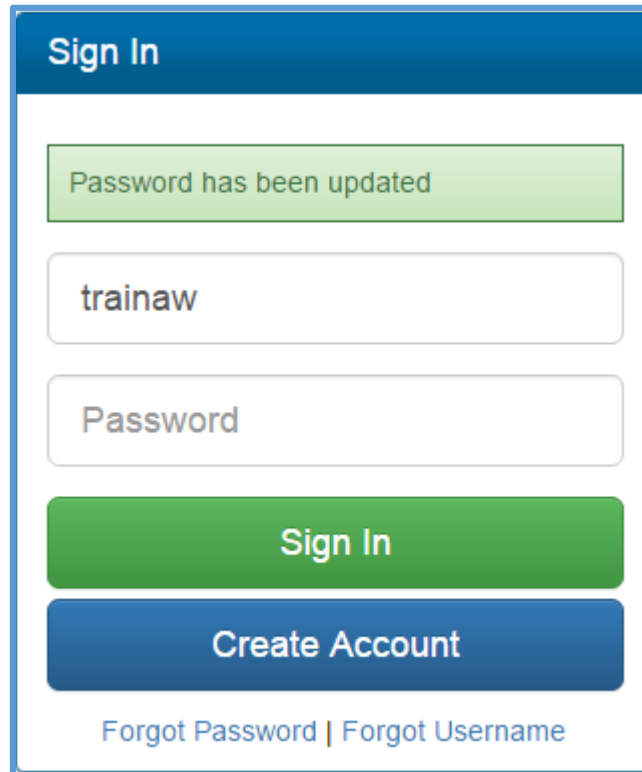
Submit

[Cancel](#)

6. Type a new password.

7. Confirm the password.
8. Click **Submit**.

Practice Lab displays the **Sign In** page with a message that your password has been updated:




The screenshot shows a 'Sign In' page with a blue header. Below the header is a green message box that says 'Password has been updated'. Underneath are two input fields: the first contains the text 'trainaw' and the second is labeled 'Password'. Below the input fields are two buttons: a green 'Sign In' button and a blue 'Create Account' button. At the bottom of the form, there are two links: 'Forgot Password' and 'Forgot Username'.

Forgot Answer

If you forget the answer to your secret question, you can still reset your password. Use the following steps:

1. Follow the steps to reach the **Forgot Password** page with your security question.

Practice Lab displays the **Forgot Password** page with your security question:



Forgot Password

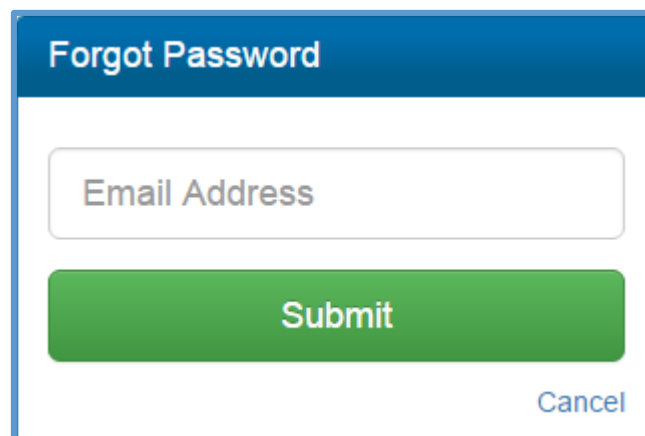
In what city were you born?

Submit

[Forgot Answer](#) [Cancel](#)

2. Click **Forgot Answer**.

Practice Lab displays the **Forgot Password** page for your email address:



Forgot Password

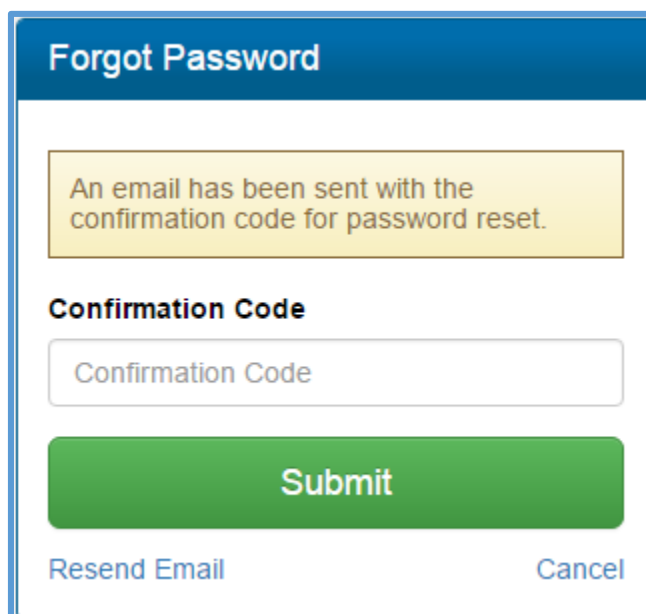
Submit

[Cancel](#)

3. Type your email address.

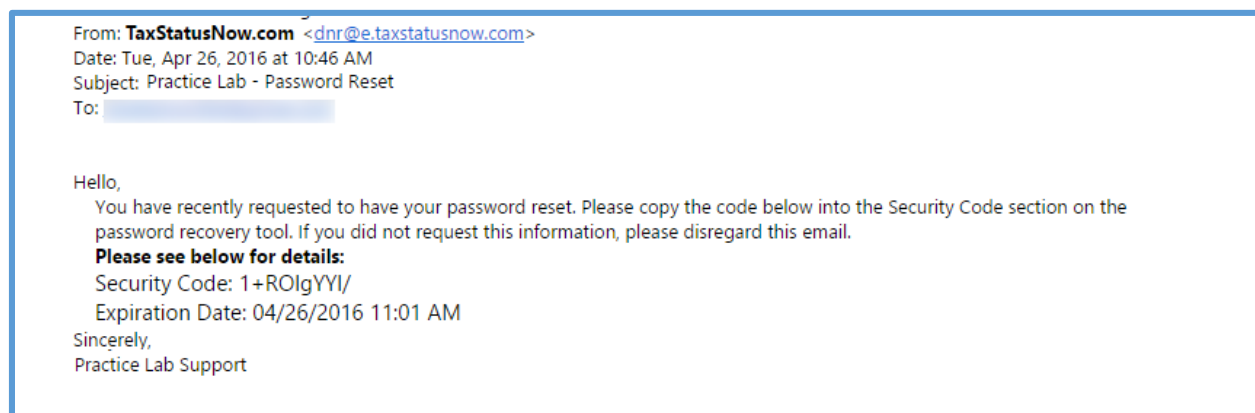
4. Click **Submit**.

Practice Lab displays the **Forgot Password** page for your confirmation code:



5. Find the email from TaxStatusNow.com.

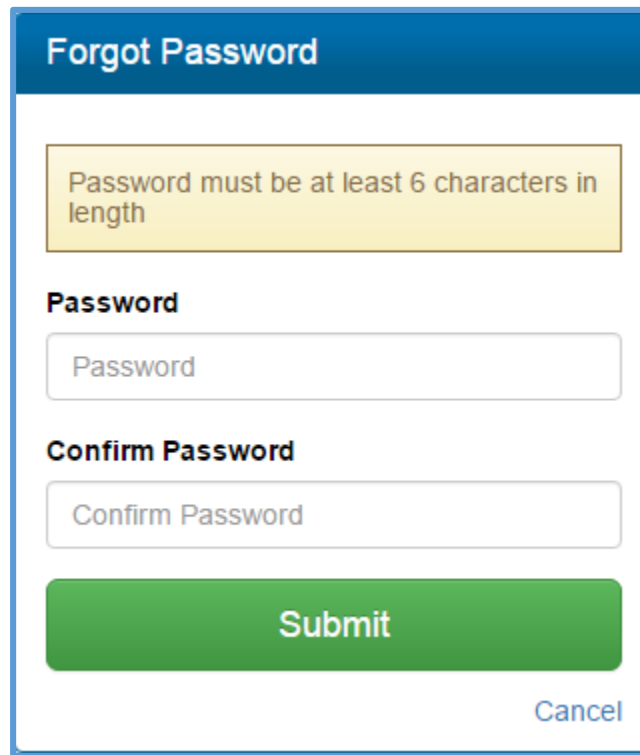
Your email service displays the email:



6. Type the security/confirmation code from the email on the **Forgot Password** page.

7. Click **Submit**.

Practice Lab displays the **Forgot Password** page to create a new password:



Forgot Password

Password must be at least 6 characters in length

Password

Confirm Password

Submit

Cancel

8. Type a new password.
9. Confirm the password.
10. Click **Submit**.

Practice Lab displays the **Sign In** page with a message that your password has been updated.

Using the Practice Lab

After you log in, you can take the lessons on this page:

Practice Lab

Hello, Kimpractice17 Options

Practice Lab - Home

Welcome to the practice lab. The links below will help you get a better understanding of the software and best practices regarding tax processes. If you would like to begin using the software in the practice area, please press the link below.

[Go to Practice Area »](#)

Section 1: Getting Started with TaxSlayer Pro Online

- [▶ Pro Online: Login and Passwords](#)

Section 2: Configuring TaxSlayer Pro Online

- [▶ Setting up Site Information](#)
- [▶ Setting up Security Templates](#)
- [▶ Adding Preparers](#)
- [▶ Working with Custom Questions](#)

Section 3: Installing TaxSlayer Pro Online

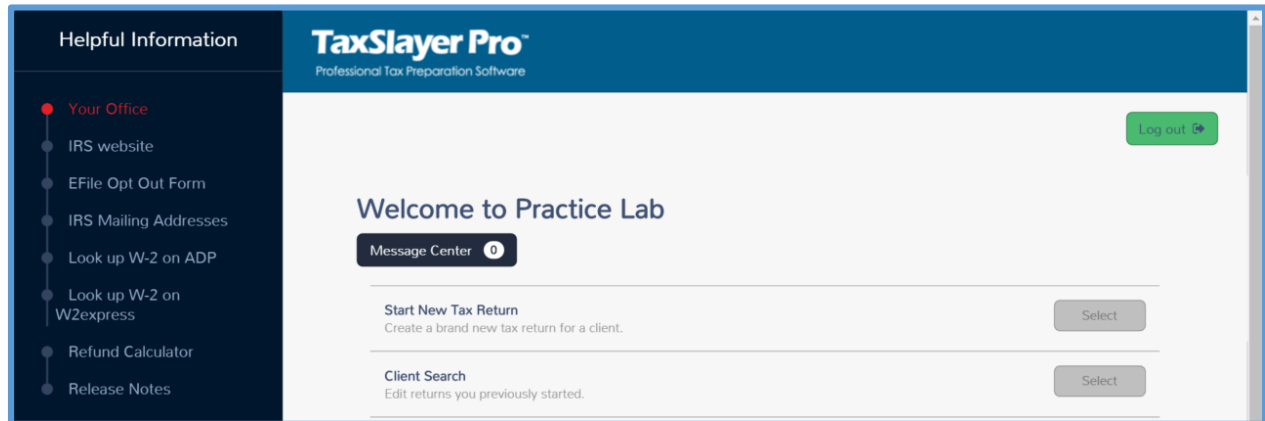
- [▶ Contingency Procedures](#)
- [▶ Installation and Network Configuration](#)
- [▶ Setting up Site Information](#)
- [▶ Setting up Security Templates](#)

Preparing Practice Returns

When you are ready to practice preparing returns, use the following steps:

1. Click **Go to Practice Area** from the **Practice Lab – Home** page.

Practice Lab displays the **Welcome to Practice Lab** page:



On the **Welcome to Practice Lab** page, you can access the **Start New Tax Return** and **Client Search** features. This page has the same appearance and functionality as the live TaxSlayer Pro Online **Welcome** page.

NOTE: Do **not** prepare live returns on the Practice Lab. You should only use this site to practice returns.

2. Click **Select** on the **Start New Tax Return** line.

Practice Lab displays the **Enter Social Security Number** page:

Enter Social Security Number

Social Security Number

Confirm Social Security Number

Available Taxpayer Profiles

Start Return

3. Just as described in the *Starting a Tax Return* lesson, type the Social Security number twice for verification.

TIP: For the purposes of the Practice Lab, we recommend that you use *00* for the fourth and fifth numbers in the Social Security number. The Social Security Administration does not use these numbers in those places for live Social Security numbers, so this ensures that you create a practice Social Security number. For example, you can use *111-00-1234*.

4. Click **Available Taxpayer Profiles**.

Practice Lab displays the **Available Taxpayer Profiles** section:

The screenshot shows a software interface with a blue border. At the top, there is a grey dropdown menu labeled "Enter Social Security Number" with a right-pointing arrow. Below it is a blue header bar labeled "Available Taxpayer Profiles" with a downward-pointing arrow. The main content area is divided into two sections. The first section is titled "Office Profiles" and contains a blue link "Basic (No Profile)" with a right-pointing arrow, followed by the text "Create a return without a Taxpayer Profile." and a vertical scrollbar. The second section is titled "Assigned Profiles" and contains a blue link "3189 Master Profile" with a right-pointing arrow and a small blue icon, followed by the text "IRS Guidelines" and a vertical scrollbar. At the bottom right of the interface is a green button labeled "Start Return".

5. Select a taxpayer profile.
6. Click **Start Return**.

Practice Lab displays the **What's your filing status?** page:

Enter the Form Number...

Filing Status Personal Information Dependents

What's your filing status?

Need help determining your filing status?

Single

Married Filing Joint

Married Filing Separate

Head of Household

Qualifying Widow(er) with Dependent Children

[Filing Status Wizard](#)

7. Complete the return as described in the *Preparing a Tax Return* lessons. Use the problems and exercises in IRS Publication 4491-W, *VITA/TCE Workbook, Comprehensive Problems and Practice Exercises*.

You can prepare and print a return, with the exception of the following:

- You can mark a return for review. However, reviewers cannot review returns. When you mark the return for review and save the return, the return is complete for purposes of the Practice Lab.
- You cannot electronically file a return.
- If your site will use Consent to Use and Consent to Disclose statements, you do not see them in the Practice Lab.

Using the Office Client List

When you complete returns, you can search for an existing taxpayer and view information about that return. To do so, use the following steps from the **Welcome to Practice Lab** page:

1. Click **Select** on the **Client Search** line.

Practice Lab displays the **Office Client List** page:

Office Client List

2015 Client Tax Return List

Filter by Status: Any Status

Filter by Return Tag: Any Tag

Search Client list

Show 10 entries

Showing 1 to 1 of 1 entries

SSN	NAME	PHONE	PREPARER	STATUS	
XXX-XX-1234	First Last	(770) 555-1212	IRS Preparer	In Progress	Tools Select

2. You can filter by the return tag or search the client list. However, all returns in this list are in progress, so you can only filter by that status.
3. You can add notes, view/edit return tags, or print the return, just as described in the TaxSlayer Pro Online lessons.
4. If you want to view the client status, select **Client Status** from the **Tools** drop-down list.

Practice Lab displays the **Client Status** page:

Client Status ✕ Cancel

Primary	111-00-1234 (First Last)	Federal Type	No information
Secondary		IRS Transaction date	No Information
Home Phone		Office	369258
Cell Phone			
Address			

Transmitted Fee Summary

Preparation Fee	Documentation Fee	E-file Fee	Total Fees
\$0.00	\$0.00	\$0.00	\$0.00

Client Return History

Action Taken - CreateReturn	Return Information -
Log Time - 4/26/2016 11:26:39 AM	Filing Status -
Preparer - IRS Preparer	AGI - 0
Ero - Practice Lab	Return Fees -
SSN -	
States on Return -	

5. On this page, you can view the client's information and return history. Remember, you cannot e-file returns in Practice Lab, so you cannot view transmission information.

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