



# UNITED WE THRIVE

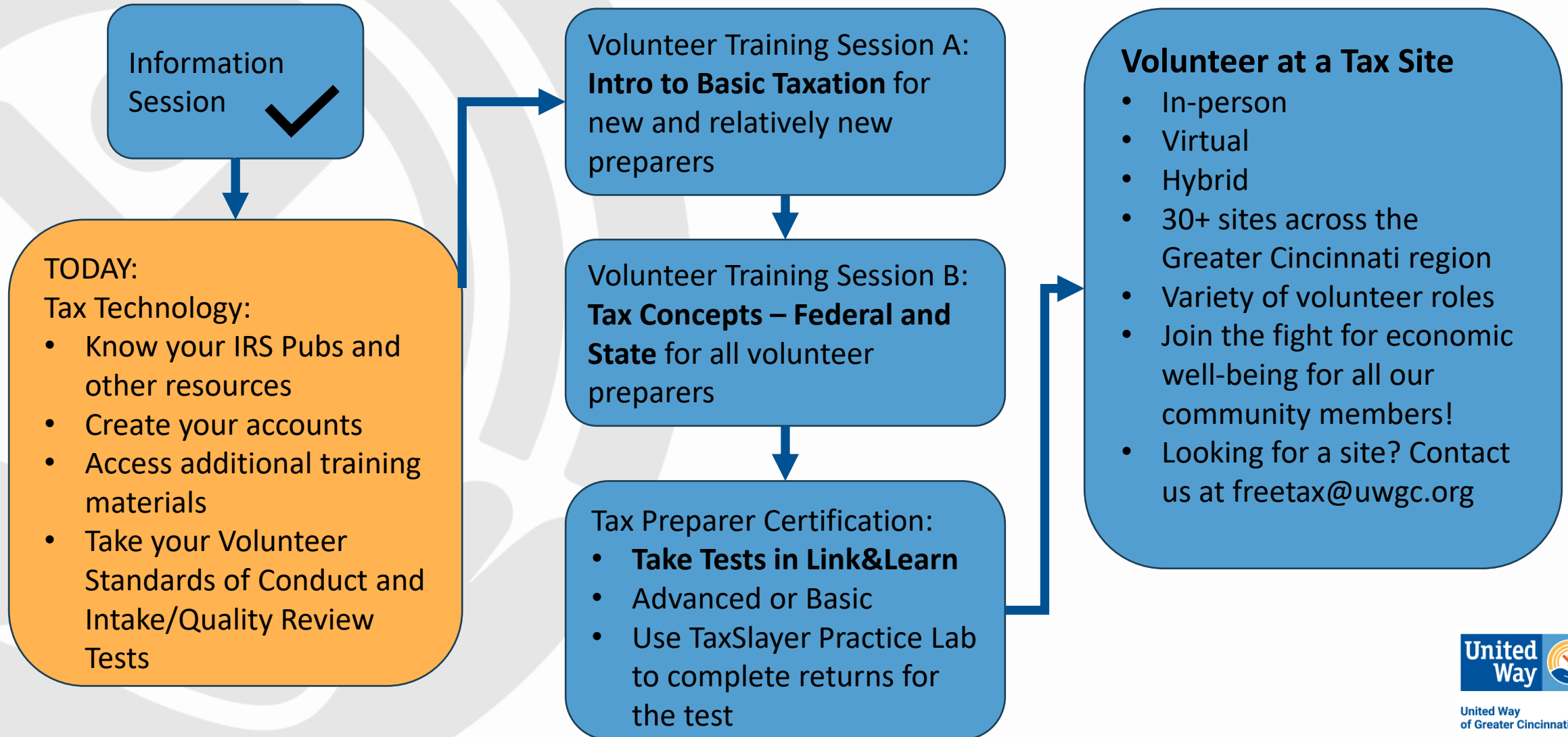
VITA New Volunteer Tech Training

**LIVE UNITED**<sup>®</sup>  
[www.uwgc.org](http://www.uwgc.org)

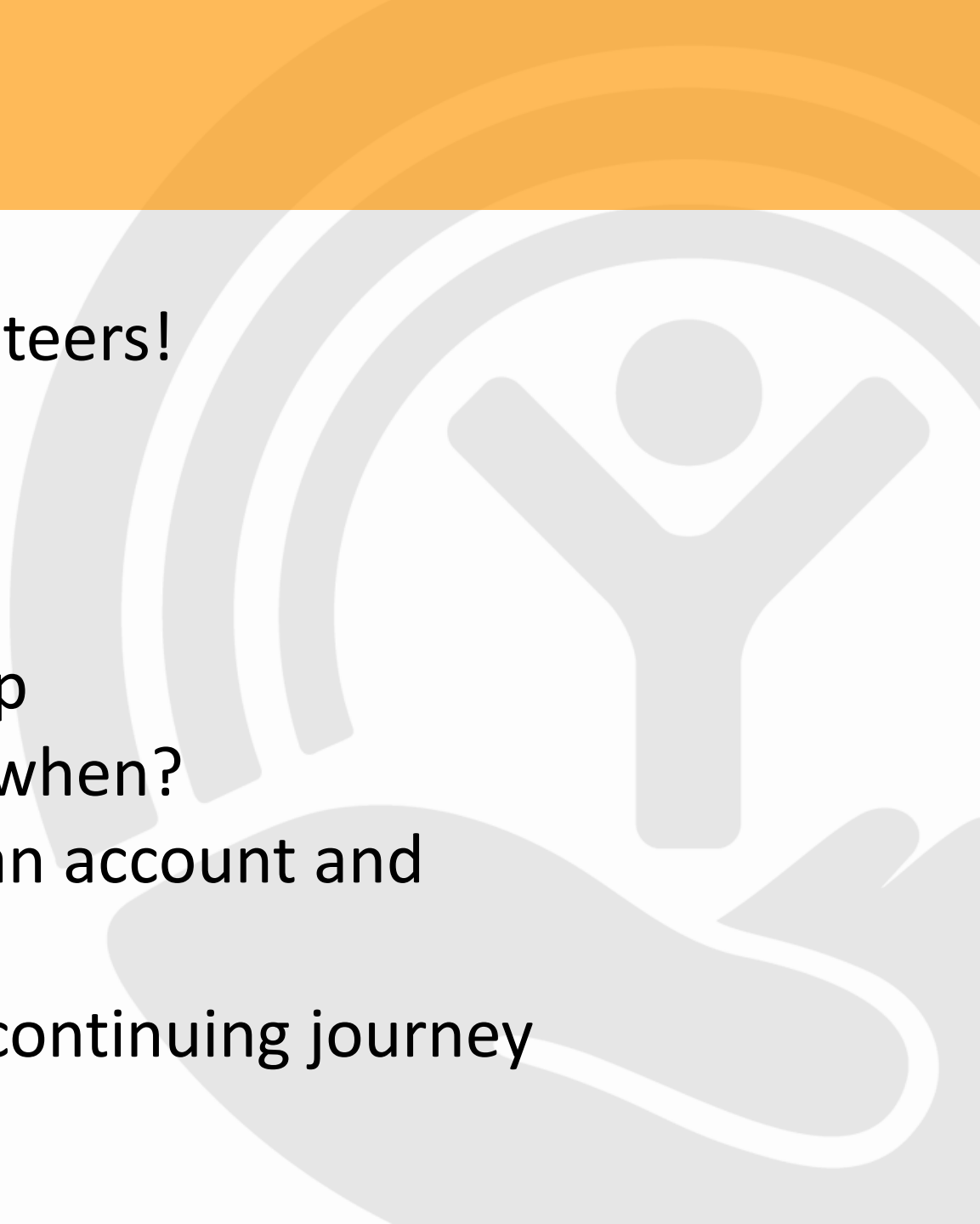


United Way  
of Greater Cincinnati

# Welcome To Free Tax Prep – Your Volunteer Pathway



# Today's Agenda

- Welcome to all new VITA volunteers!
  - Resources
  - Mobilize
  - What happens at a tax site?
  - IRS/Link & Learn: account setup
  - Testing: which tests, how, and when?
  - TaxSlayer Practice Lab: create an account and access the Practice Lab
  - Additional Resources for your continuing journey
- 

# Resources for this session:

- [IRS Pub 6744](#) *Volunteer Assistor's Test/Retest*
- [IRS Pub 4961](#) *Volunteer Standards of Conduct – Ethics Training*
- [IRS Pub 5838](#) *Volunteer Intake/interview and Quality Review Handbook*
- [Link and Learn](#) VITA/TCE Central
- [TaxSlayer Practice Lab](#)
- [UWGC Free Tax Prep Password Sheet](#)

# Volunteer Sign-Up

- If you haven't already, visit United Way's Free Tax Prep [volunteer page](#) to confirm your contact information.
- Join our [Mobilize group](#) for the most up to date information and resources for the 2024 tax season.
- Coordinate volunteer activities directly with a Site Coordinator (contact info will be emailed to you) or contact us directly at [freetax@uwgc.org](mailto:freetax@uwgc.org)

# What Happens at a Tax Site?

- Greeting (Dedicated Greeter)
- Intake Paperwork/Screening (Taxpayer)
- Interview (Screener/Preparer)
- Tax Preparation (Certified Preparer)
- Quality Review (Certified Reviewer)
- Print
- E-filing (Site Coordinator)





# Link & Learn: certify with the IRS

- Link & Learn is the IRS platform for certifying VITA volunteers.
- Access [Link & Learn](#) to set up your account.

Note: Those seeking CE credits should review IRS guidance in [Pub 5362](#) and make sure to enter their “professional status for CE credits” when registering in Link & Learn. **Advanced** certification is the bare minimum qualification for CE credits.

# Link & Learn Landing Page






Home **Create Account**

Username or email





Password

[Sign in](#) [Forgot password](#)

**Instructor Tools**

-  Classroom Presentations
-  Lesson Plans
-  Instructor Guide 4555e

**Quick Links**

-  Link & Learn Taxes Lessons
-  Certification Test/Retest PDFs
-  VITA/TCE Training Guide
-  Evaluations





# Link & Learn: Account Set Up

## Self-Registration

Complete the fields below to create your account in the system.  
Required fields are marked by an asterisk (\*), all other are optional.

- \* Group:  01 - VITA Volunteer
- 02 - TCE - AARP Volunteer
- 03 - TCE - Other Volunteer
- 04 - VITA - Military Volunteer
- 05 - IRS Employee - SPEC
- 06 - IRS Employee - Other
- 07 - Foreign Student Site Volunteer
- 08 - IRS Employee - Volunteer
- 09 - Federal Employee non-IRS employee
- 10 - SPEC OPI Volunteer
- 11 - Other
- \* Do you want to take SPEC OPI Training?  Yes  No
- \* Do you require activation of multiple OPI Pins?  Yes  No
- \* Do you want to take the Site Coordinator certification?  Yes  No
- \* Are you an Instructor?  Yes  No
- \* Are you an IRS SPEC Territory Manager?  Yes  No
- \* Do you plan to volunteer in the VITA/TCE Program?  Yes  No



# Link & Learn: Account Set Up

## Notes:

- Your name should match your driver's license, unless you are expecting CE credits, then your name should match that on your PTIN registration.
- Password requirements are can be viewed when you create your password. NOTE: **\*\*\* Special characters are not allowed \*\*\***
- Now use your password sheet to record the User ID and password you just created!

\* Training Source  
Other

\* First Name  
Legal Name Per Driver's License

\* Last Name  
Legal Name Per Driver's License

SEID  
(For IRS employees Only)

\* Username

\* Password

\* Confirm Password

\* Email Address

\* Confirm Email Address



# Link & Learn: Account Set Up

\* Address 1

Your home address

Address 2

\* City

\* State / Provision

Select a State / Provision



\* Postal Code

Daytime Telephone Number

\* Time Zone

(GMT-05:00) Eastern Time (US & Canada)



Partner/Organization Name

United Way of Greater Cincinnati



\* Years You Have Volunteered

1



# Continuing Education Credits

Professional status for Continuing Education credits or Circ 230 ONLY

Select role for CE Credits ▼

Must be completed for those seeking CE Credits! Otherwise leave as "Select role..."

PTIN Number ?

Enter PTIN as it appears on your PTIN card, however, do NOT include a hyphen

Name as listed on PTIN Card

Enter name exactly as listed on PTIN card

CTEC Number ?

Leave Blank

**PLEASE NOTE:** Enter your PTIN as it appears on your PTIN card; however, do not include a hyphen.



Professional status for Continuing Education credits or Circ 230 ONLY

Select role for CE Credits ▼

- Select role for CE Credits
- Attorney
- Certified Financial Planner
- Certified Public Accountant (CPA)
- CTEC or CRTP
- Enrolled Agent
- Non-credentialed Tax Return Preparer



United Way of Greater Cincinnati

# VITA Test Booklet



# 6744

VITA/TCE Volunteer Assistor's Test/Retest  
Volunteer Income Tax Assistance (VITA) / Tax Counseling for the Elderly (TCE)

2023 RETURNS



Take your VITA/TCE training online at <https://apps.irs.gov/app/vita/>. Link to the Practice Lab to gain experience using tax software and take the certification test online, with immediate scoring and feedback.

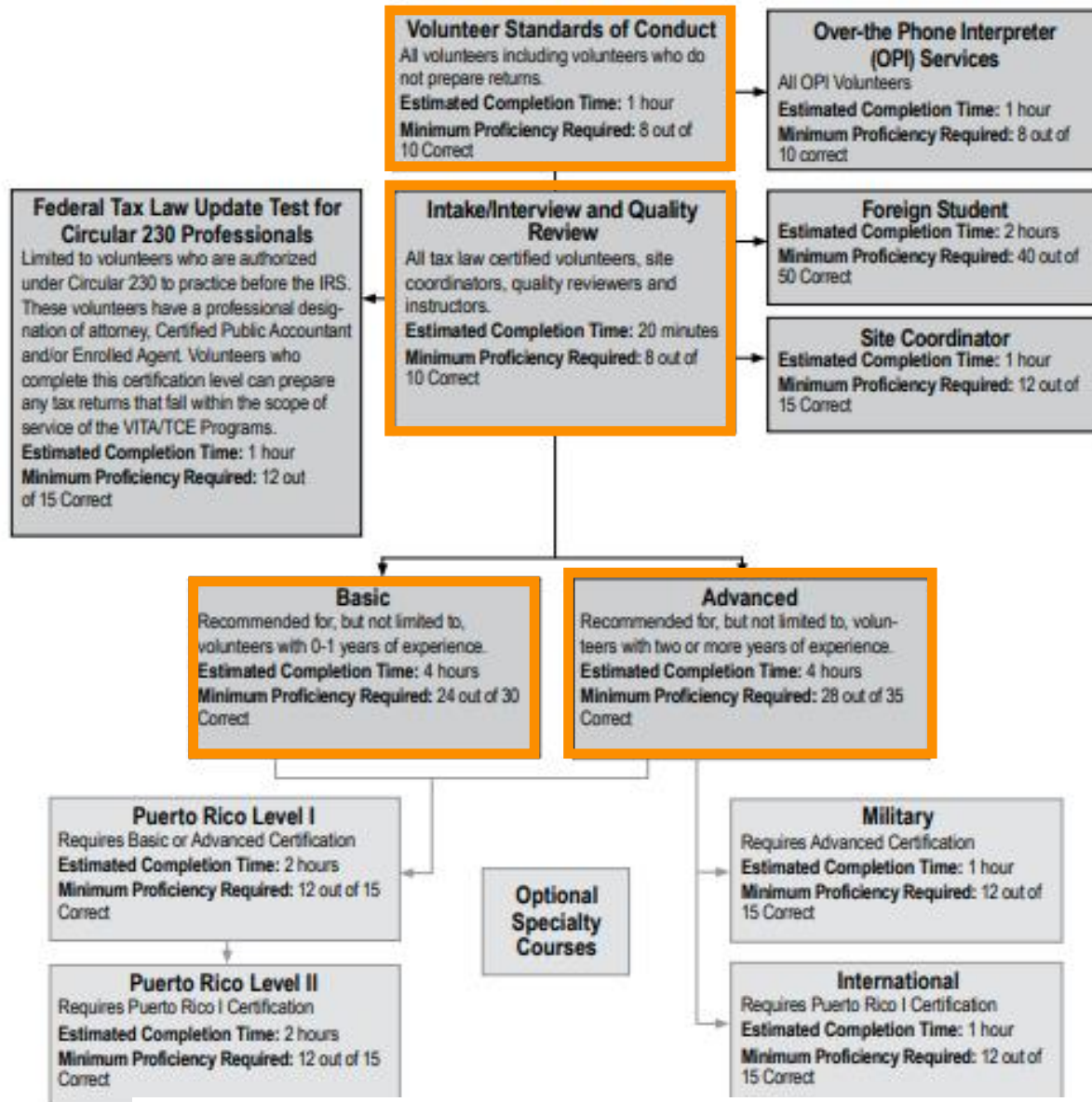


IRS Testing  
Take your tests on [Link&Learn](#), but access [IRS Pub 6744](#) to find the questions, scenarios, and associated documents.

# IRS Pub 6744 VITA Test Booklet

- 203 pages, but **don't panic** – we don't take all the tests! 😊
- Test page numbers:
  - Volunteer Stds of Conduct – p. 14
  - Intake/Interview and QR – p. 21
  - Basic Preparer – p. 31
  - Adv Preparer – p. 69
- [IRS Pub 6744 VITA/TCE Volunteer Assistor's Test/Retest](#)

# Certification Tests



Step 1: All volunteers take the Volunteer Standards of Conduct Test.

Step 2: All volunteers take the Intake/Interview and Quality Review Test.

Step 3: All preparers/reviewers take at least the basic test, but preferably the advanced!

Note: 80% is considered a passing grade and everyone can re-test once per test.

# Your First Exam: Volunteer Standards of Conduct



- Read/review the *Volunteer Standards of Conduct (VSOC)* for VITA volunteers in [IRS Pub 4961](#) (p. 1-15).
- If you would like to view the questions before testing, preview them in [IRS Pub 6744](#), p. 14.



# Take your VSOC Test

- Sign into your [Link & Learn](#) account.
- Go to **2023 VITA/TCE Certification Test** tab.
- Go to **Advanced** tab.
- Select **Volunteer Standards of Conduct Exam**.
- Take the exam.

# Link & Learn – Advanced Tab



3 VITA/TCE Certification Tests [My Account](#)

[Circular 230](#) [Basic](#) [Advanced](#) [Military](#) [International](#) [Puerto Rico](#) [Foreign Student](#)

### 2023 Volunteer Standards of Conduct Exam

- Score:
- Exam Status:
- Attempts: 0

### 2023 Intake/Interview and Quality Review Exam

- Score:
- Exam Status:
- Attempts: 0

### 2023 Site Coordinator Exam

- Score:
- Exam Status:
- Attempts: 0

### 2023 Advanced Exam

- Score:
- Exam Status:
- Attempts: 0

If you would like to review the Volunteer Standards of Conduct course, click here to review the course in PDF format.

[Click here to review the Intake/Interview & Quality Review training.](#)



# Your Second Exam: Intake/Interview & Quality Review

- Read/review pages 3-15 of [IRS Pub 5838](#) *Intake/Interview and Quality Review Handbook*.
- If you would like to view the questions before testing, preview them in [IRS Pub 6744](#), p. 21.

# Take the Intake/Interview & Quality Review Test

- Sign into your [Link & Learn](#) account.
- Go to **Certification Test** tab.
- Go to **Advanced** tab.
- Select **2023 Intake/Interview and Quality Review Exam**.
- Take the exam.

# Congrats! First Steps Successful!

- You took and passed the VSOC and Intake/Interview tests! Now you are ready to participate in tax preparer training Parts A and B. Sign up [here](#) if you have not already done so.
- Even if you are convinced you only want to help in the greeting and intake process, preparer training makes you much better at both!
- To prepare returns, you will need to take either the Basic or Advanced certification exam.



# Practice Tax Returns

- Both exams will require you to create practice tax returns.
- We use an IRS provided software called TaxSlayer Pro - it adequately handles all types of VITA returns.
- TaxSlayer provides a special “practice area” for you to create your practice returns.
- Let’s get started:

# TaxSlayer Software

- [TaxSlayer Pro for VITA](#)
- Select [Practice Lab](#).
- Enter universal password: **TRAINPROWEB** (all CAPS)
- Create your personal account:
  - Remember to record username and password on your password sheet!
  - The Password has a 15-digit requirement.
- Select **Go to Practice Area**.
- Select **Start New 2023 Tax Return**.
- Select **Start Return**.



# TaxSlayer VITA Springboard <https://vita.taxslayerpro.com/>

VITA/TCE Springboard Home Email Support

~~My Account Login~~

## Practice Lab

The practice lab will allow you to setup and run through the steps of creating/viewing/modifying returns in the safety of our testing environment.

[Click here to get started.](#)

## Pro Online

In order to get started with creating, viewing, modifying, or transmitting returns for the IRS ensure your site has been created and you have your login credentials ready.

[Please click here to login to your site.](#)

## VITA/TCE Blog

The VITA/TCE Blog will keep you up to date with any changes and notifications regarding IRS Preparers and Standards in creating/modifying returns for the IRS.

[Click here view the latest updates.](#)



## Support Guides

Please use the guides below to help yourself get acquainted with the various applications.

- [Download the Pro Online User Guide](#)
- [Download the Pro Desktop User Guide](#)

## VITA/TCE Knowledgebase

Search Knowledgebase

[Find Matches](#)

Click [here](#) to search the entire VITA/TCE Knowledgebase.



# TaxSlayer VITA Springboard <https://vita.taxslayerpro.com/>

FIRST do this:

**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**

Enter "TRAINPROWEB"

THEN do this:

**Sign In**

**Username**

**Password**

**Sign In**

**Create Account**

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

Click "Create Account"



# Create TaxSlayer Account

**Create New Account**

**Account Information**

<b>Email Address</b> <input type="text" value="Email Address"/>	<b>Confirm Email Address</b> <input type="text" value="Confirm Email Address"/>	<b>Required</b>
<b>Username</b> <input type="text" value="Username"/>		
<b>Password</b> <input type="password" value="Password"/>	<b>Confirm Password</b> <input type="password" value="Confirm Password"/>	
<b>Program Type</b> <input type="text" value="Please Select"/>		← VITA
<b>Site Identification Number (SIDN)</b> <input type="text" value="Site Identification Number (SIDN)"/>		← Skip this field

**Password Recovery**

<b>Security Question</b> <input type="text" value="Please Select a Question"/>
<b>Security Answer</b> <input type="text" value="Security Answer"/>

[Cancel](#)

**Important: Now use your password sheet to record the User ID and password you just created!**

# Practice Lab: home page

## 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

- ▶ User Guide
- ▶ Pro Online: Login and Passwords

### Section 2: Configuring TaxSlayer Pro Online

- ▶ User Guides
- ▶ Setting up Site Information
- ▶ Security Templates
- ▶ Adding Preparers

### Section 3: Installing TaxSlayer Pro

- ▶ User Guides
- ▶ Contingency Procedures
- ▶ Installation and Network Configuration
- ▶ Setting up Site Information



# Additional Guides and Resources

- [IRS Pub 4012](#) *VITA/TCE Volunteer Resource Guide* – the book we use to do everything!
- [IRS Pub 4491](#) *VITA/TCE Training Guide* – great resource when certifying.
- [VITA-Train](#) by Prosperity Now – additional in-depth training and practice

# IRS Guides and Resources – Hardcopy Pickup (Dates TBD)

- We order enough hardcopies of IRS training materials for all volunteers to have their own copy.
- When the IRS ships the materials, and we have hardcopies, we will make them available for pickup at 4 of our locations.
- This information will be disseminated via Mobilize and will be published in additional training sessions when we have the dates and times.
- Until that point, [IRS Pub 4012](#) and [IRS Pub 6744](#) are available online.

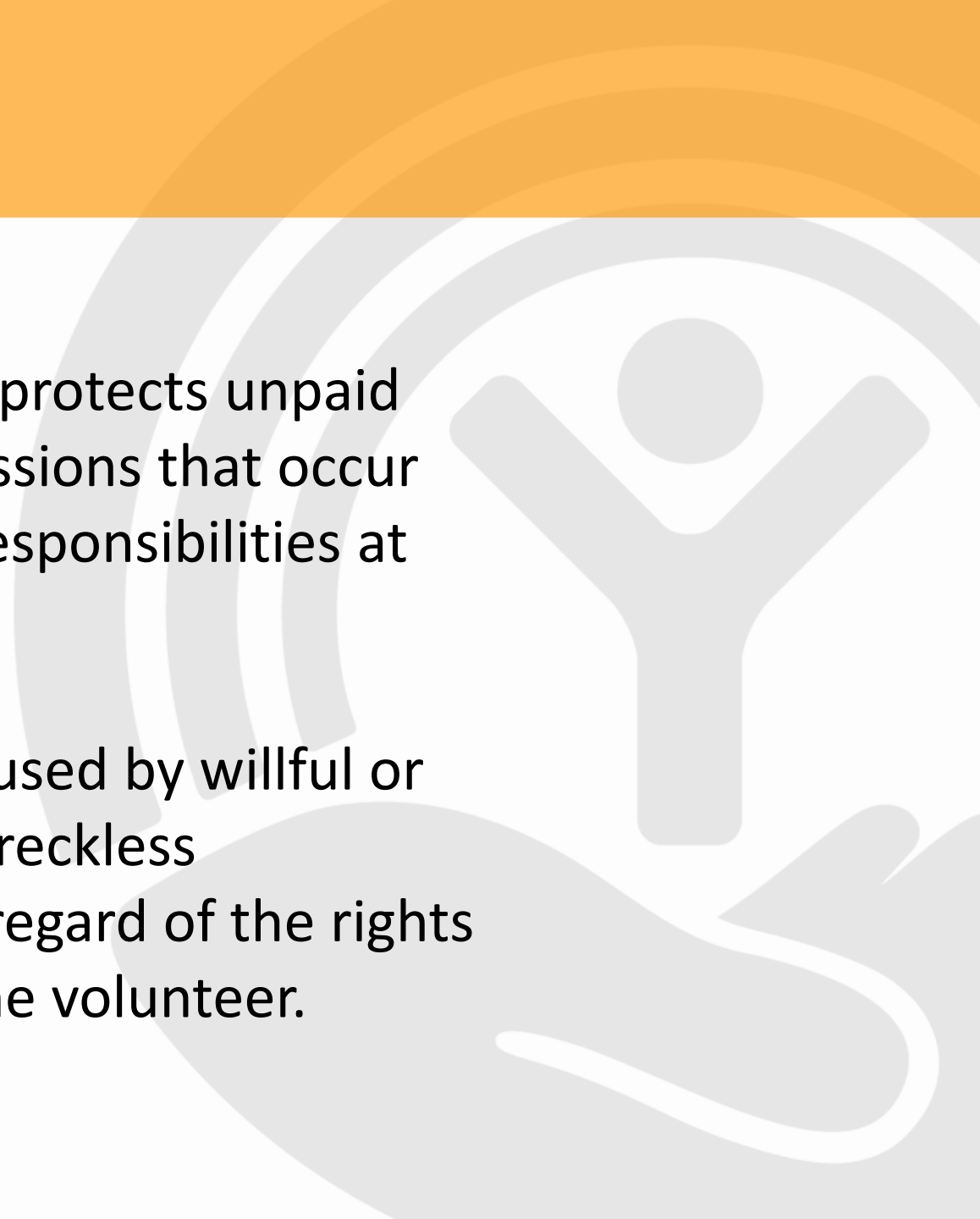


# Volunteer Liability Protection

## **Volunteer Protection:**

The Volunteer Protection Act generally protects unpaid volunteers from liability for acts or omissions that occur while acting within the scope of their responsibilities at the time of the act or omission.

It provides no protection from harm caused by willful or criminal misconduct, gross negligence, reckless misconduct, or a conscious, blatant disregard of the rights or safety of the individual harmed by the volunteer.



# Need help? We are here!

- Send a request for assistance or question(s) to:
  - [freetax@uwgc.org](mailto:freetax@uwgc.org)
  - Include your name, e-mail, and phone, and nature of your question.
- A trainer will contact you.
- Our team of trainers is here to help you. None of us knows every aspect of tax law! We will ensure you are supported when you come to volunteer at a site. ***You've got this!***



# Thank you and see you again!

We encourage everyone to attend the additional sessions of tax law training regardless of the role you plan to pursue. You will find that the scope of our tax work is mostly straightforward. Plus, the more you know about VITA and tax law, the more you will be able to help the families who seek our services. You will be a tax guru in (k)no(w) time!

