

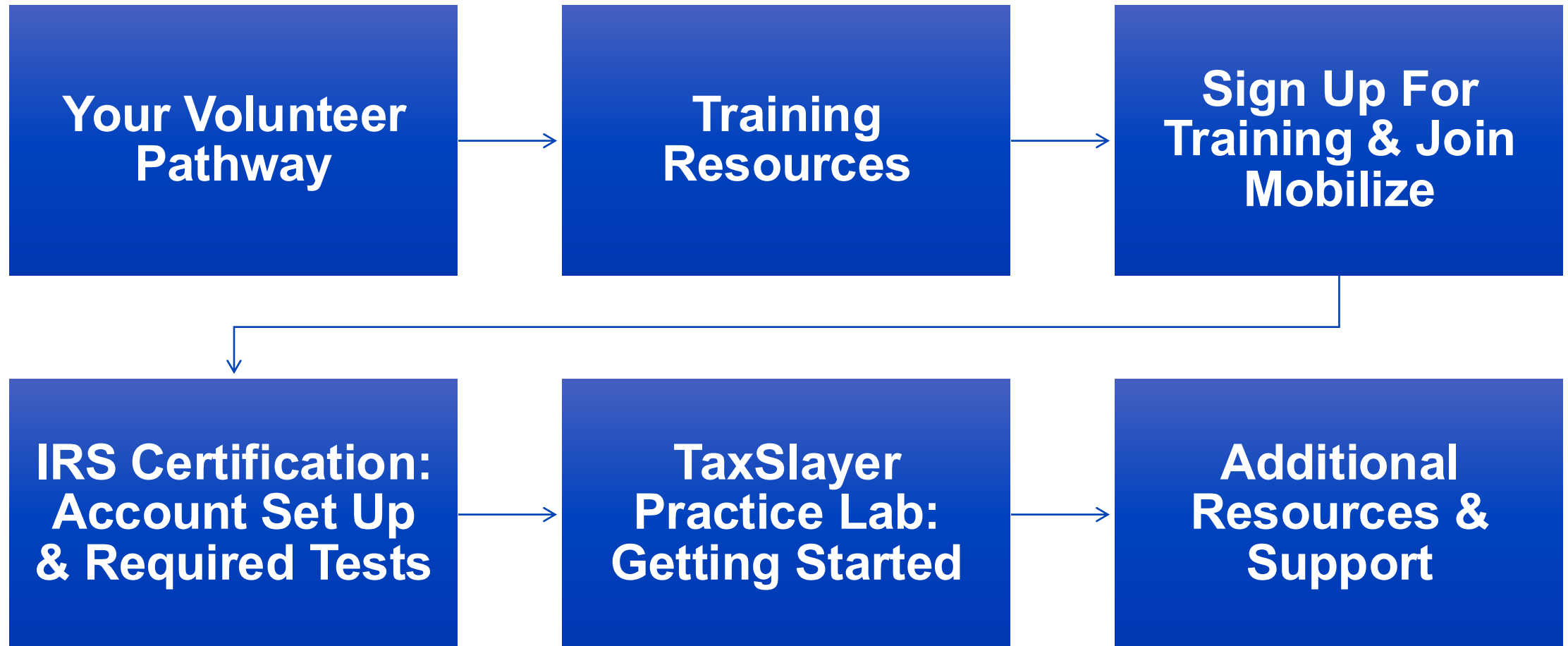
United We Thrive

New Volunteer Tech Training

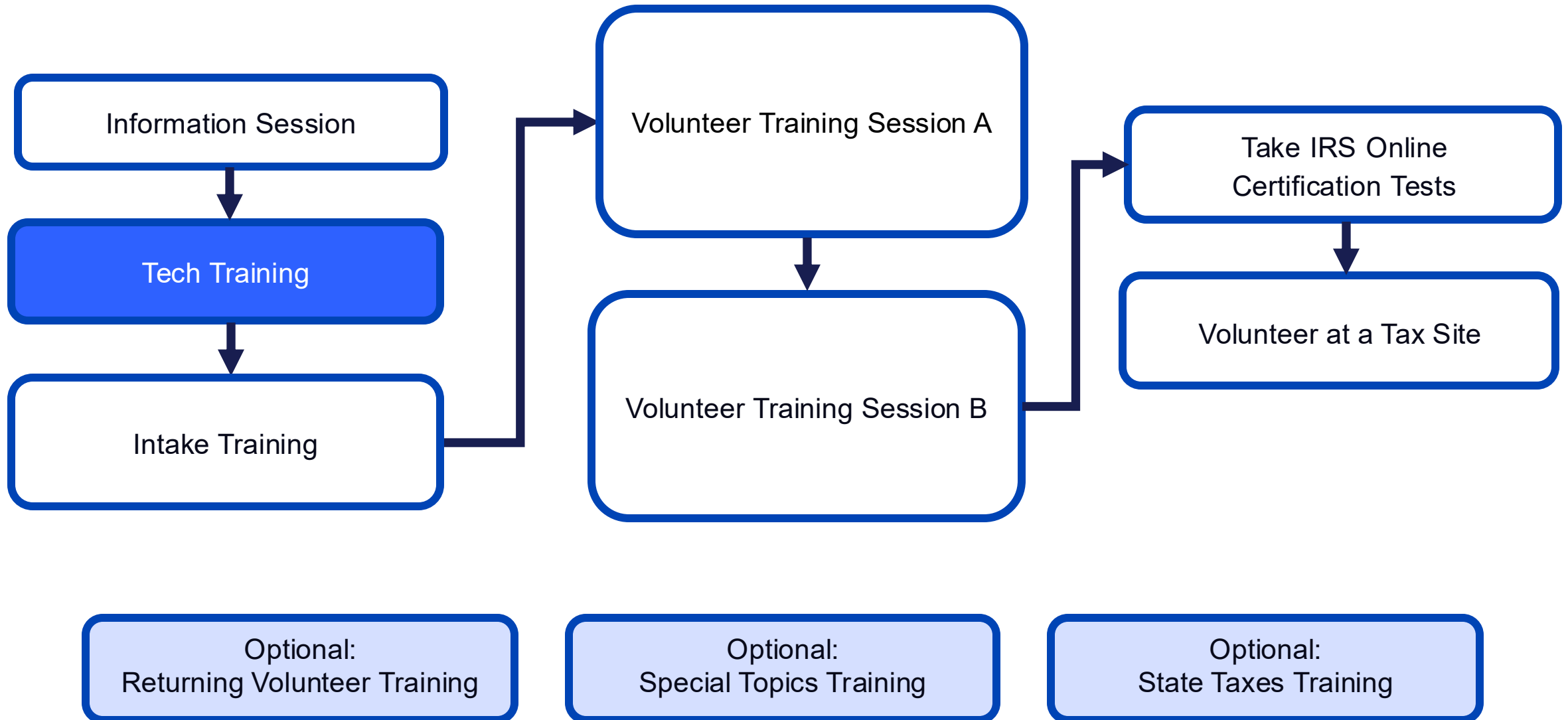
2027



Agenda



Volunteer Pathway



Resources For This Session



[UWGC Free Tax Prep
Password Sheet](#)



[Link & Learn Taxes
E-Learning](#)



[TaxSlayer
Practice Lab](#)



[VITA/TCE Central
Certification Site](#)



[IRS Pub 6744](#)

Volunteer Assistor's Test/Retest



[IRS Pub 4961](#)

*Volunteer Standards of Conduct
– Ethics Training*



[IRS Pub 5838](#)

*Volunteer Intake/Interview &
Quality Review Handbook*

Access these links in the description below the video and anytime on the [volunteer resource page!](#)

Sign Up for Training & Join Mobilize

- If you haven't already, visit United Way's Free Tax Prep [volunteer page](#) to sign up for a training or information session.
- Join our [Mobilize group](#) for the most up to date information and resources for the 2027 tax season.

Sign Up For Training

Join Mobilize

VITA/TCE Central: Account Set Up

- VITA/TCE Central is the IRS platform for certifying VITA volunteers.
- Access link.learncertification.com to set up your account.

Click Here

[VITA/TCE Central](https://link.learncertification.com)

VITA/TCE Central: Landing Page

<https://linklearncertification.com>

VITA/TCE Central

VITA/TCE Central your one-stop shop for volunteer training

VITA/TCE Central lets you find your most frequently used tools on one page - certification tests, training and testing PDFs, evaluations, Practice Lab, instructor tools and more!

[Start learning](#)

Quick Links

- [Link & Learn Taxes Lessons](#)
- [VITA/TCE Training Guide](#)
- [Practice Lab](#)
- [Fact Sheet: Continuing Education Credits](#)
- [Getting Started](#)
- [Certification Test/Retest PDFs](#)
- [Evaluations](#)
- [VSOC Training](#)
- [Intake/Interview and Quality Review Training](#)

Learning Videos

Activate Windows
Go to Settings to activate Windows.

VITA/TCE Central: Account Set Up

Important:

- Your name should match your driver's license.
- Use your [password sheet](#) to record the password you just created!



Create an account

(Fields marked below are required)

Email *

Email



First name *

First name

Last name *

Last name

Password *

Password



Password must:

- ☐ Contain at least one lower case letter
- ☐ Contain at least one upper case letter
- ☐ Contain at least one number
- ☐ Be at least 8 characters
- ☐ Be different from the user's LoginName, FirstName, LastName, and Email
- ☐ Be uncommon

Address *

Street address

Street address is required.

Address 2

Apartment, suite, unit, building, floor, etc.

City *

City

City is required.

VITA/TCE Central: Account Set Up

Cancel

Save

Account

Account Information

Profile Image

Contact Information

User Profile Details

Volunteer Position(s)

Form 13615 Details

Continuing Education

Volunteer Position(s)

Please select your volunteer position(s).

☒ **VITA Volunteer**

☐ TCE - AARP Volunteer

☐ TCE - Other Volunteer

☐ VITA - Military Volunteer

☐ IRS Employee - SPEC

☐ IRS Employee - Other

☐ IRS Employee - Volunteer

☐ Federal Employee non-IRS employee

☐ Foreign Student Site Volunteer

☐ Site Coordinator

☐ Other

☐ I do not plan to volunteer in the VITA/TCE Program

Earning Continuing Education Credits

← ↻ 🔒 https://lms.linklearncertification.com/lms/home

IRS **VITA/TCE** Central Home My Learning Certifications Volunteer Agreement Search

Search catalog 🔍 🔔 JW

VITA/TCE Central

 All Incomplete 0

 Certificates 0



2024 VITA/TCE certification tests

All individuals-including IRS employees participating in the VITA and TCE Programs-who answer tax law questions, instruct tax law, prepare or correct tax returns and/or conduct quality reviews of completed tax returns must be certified. This training prepares Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) partners and volunteers to provide quality tax return preparation services in their local communities. This fun, interactive course teaches you to accurately prepare income tax returns for individuals, and you can obtain volunteer certification along the way at your own pace! Some tax professionals can even earn continuing education credits when certifying at the designated level and meeting other specific requirements.

[Take certification test](#)



Form 13615, Volunteer agreement

After passing any of the exams, you may sign your Form 13615, Volunteer Standards of Conduct Agreement - VITA/TCE Programs.

[Sign Form 13615](#)

Continuing Education Credits

 **VITA/TCE**
Central

HomeMy LearningCertificationsVolunteer AgreementSearch

Search catalog

JW

VITA/TCE Central

All Incomplete0

Certificates0



2024 VITA/TCE certification tests

All individuals-including IRS employees participating in the VITA and TCE Programs-who answer tax law questions, instruct tax law, prepare or correct tax returns and/or conduct quality reviews of completed tax returns must be certified. This training prepares Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) partners and volunteers to provide quality tax return preparation services in their local communities. This fun, interactive course teaches you to accurately prepare income tax returns for individuals, and you can obtain volunteer certification along the way at your own pace! Some tax professionals can even earn continuing education credits when certifying at the designated level and meeting other specific requirements.

Take certification test



Form 13615, Volunteer agreement

After passing any of the exams, you may sign your Form 13615, Volunteer Standards of Conduct Agreement - VITA/TCE Programs.

Sign Form 13615

JW

Jessie Welker

Profile

Dashboard

Help

Logout

Continuing Education Credits

Cancel

Save

Account Information

Profile Image

Contact Information

User Profile Details

Volunteer Position(s)

Form 13615 Details

Continuing Education

Continuing Education

NOTE: For tax professionals earning CPE credits only

Volunteer Preparer's Tax Identification Number (PTIN)

PTIN must use the letter "p", follow by eight (8) numeric digits: p12345678.

A PTIN is a "Preparer Tax Identification Number" issued by the IRS and required for all paid tax return preparers. Enrolled Agents and Other Tax Return Preparers interested in obtaining VITA/TCE credits must also have a PTIN. More information about PTINs is available on [irs.gov](https://www.irs.gov). Please do not include the hyphen when typing in your PTIN number. Please note do not enter your SIDN in this field.

First and last name on PTIN account

CTEC ID number

A valid CTEC Numbers require 7 alphanumeric characters (A#####). The first character should be "A" followed by 6 digits.

Professional status

--Select--

Site Identification Number (SIDN)

SIDN is the letter "S" followed by 8 digits. For example: S12345678



Be sure to save!

Your IRS Test Booklet

 [Publication 6744](#)
Volunteer Assistor's Test/Retest

Physical copies will be available

- Preview the questions
- Work through the scenarios
- Submit your answers online



6744

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

2026 RETURNS



**LINK &
LEARN**

TAXES

Take your VITA/TCE training online at 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.



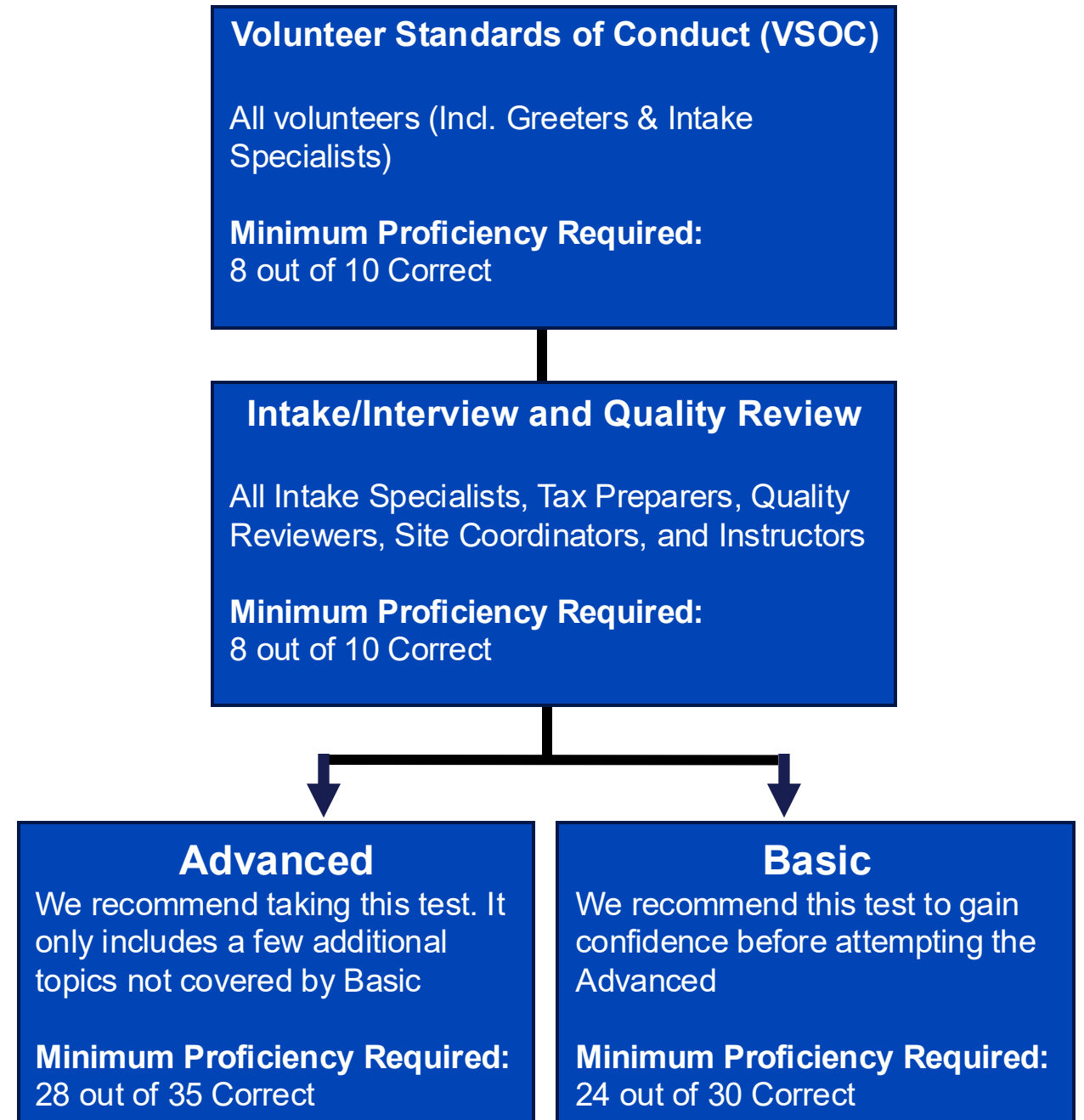
IRS Pub 6744 VITA Test Booklet

- **Don't Panic** – we don't take all the tests
- **Important Page Numbers:**
 - Volunteer Standards of Conduct – p. 14
 - Intake/Interview and QR – p. 21
 - Basic Preparer – p. 31
 - Adv Preparer – p. 75

Certification tests

- **Step 1:** All volunteers take the Volunteer Standards of Conduct Test.
- **Step 2:** All Intake Specialists, Tax Preparers, Quality Reviewers, Site Coordinators, and Instructors 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 Test: Volunteer Standards of Conduct

- The Volunteer Standards of Conduct (VSOC) test includes **10 multiple-choice questions** on ethics in tax preparation.
- **Prepare:** Review [IRS Pub 4961](#), pages 1–19.
- **Preview the questions:** See [IRS Pub 6744](#), page 14.

Accessing Your Certification Tests



VITA/TCE
Central

[Home](#)

[My Learning](#)

[Certifications](#)

[Volunteer Agreement](#)

[Search](#)



JW

Certifications

▼ Filters

Relevance ▼

Subject ▼



01 - Basic

The 2024 Basic certification includes: the 'Volunteer Standards of Conduct Test', the 'Intake/Interview and Quality Review Test', and the 'Basic Test'. This is a good place to start if you only need to take VSC and Intake/Interview. Training documents are available for Volunteer Standards of Conduct and Intake/Interview and Quality Review .

by VITA/TCE Central

🎓 669 learners

🔖 Bookmark



02 - Advanced

The 2024 Advanced certification includes: the 'Volunteer Standards of Conduct Test', the 'Intake/Interview and Quality Review Test', and the 'Advanced Test'. Training documents are available for Volunteer Standards of Conduct and Intake/Interview and Quality Review .

by VITA/TCE Central

🎓 977 learners 🏆 Certificate

🔖 Bookmark

Accessing Your Certification Tests

- Select **02 – Advanced**
(this does not lock you into taking the advanced test)
- The VSOC test is only available after selecting a tax law exam. It will not show up on the certifications screen.

Home My Learning Certifications Volunteer Agreement Search Search catalog

Certifications

Filters Relevance

Subject



01 - Basic

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by VITA/TCE Central

669 learners

Bookmark



02 - Advanced

The 2024 Advanced certification includes: the 'Volunteer Standards of Conduct Test', the 'Intake/Interview and Quality Review Test', and the 'Advanced Test'. Training documents are available for Volunteer Standards of Conduct and Intake/Interview and Quality Review .

by VITA/TCE Central

977 learners Certificate

Bookmark

Take your VSOC Test

- Select "**Start**" to take the VSOC test.

[< Back](#)

Program

02 - Advanced

Created by Link & Learn Taxes

Provides certificate



The 2024 Advanced certification includes: the 'Volunteer Standards of Conduct Test', the 'Intake/Interview and Quality Review Test', and the 'Advanced Test'.

Training documents are available for [Volunteer Standards of Conduct](#) and [Intake/Interview and Quality Review](#).

Start

Program content



Volunteer Standards of Conduct - Test

2024 Volunteer Standards of Conduct - Exam It is important that all individuals who volunteer their time and services in the VITA/TCE program understand their roles and responsibilities under the program. All volunteers must: Take the Volunteer Standards of Conduct (VSC) Training , at a minimum, the first year of...

by VITA/TCE Central

3718 learners

Updated

Start



Intake/Interview and Quality Review - Test

SPEC requires all instructors, coordinators, client facilitators, return preparers, quality reviewers and any volunteer assisting taxpayers in completing Form 13614-C, Intake/Interview and Quality Review Sheet, and/or assigning tax returns to preparers to pass the Intake/Interview and Quality Review test with a scor...

by VITA/TCE Central

Start

Your Second Test: Intake/Interview & Quality Review

- The **Intake/Interview and Quality Review test** covers interviewing taxpayers, reviewing their information, and checking returns for accuracy.
- **Prepare:** Review [IRS Pub 5838](#), pages 3–15.
- **Preview the questions:** See [IRS Pub 6744](#), page 21.

Accessing Your Certification Tests

- Select **02 – Advanced**
(this does not lock you into taking the advanced test)
- The Intake/Interview & Quality Review test is only available after selecting a tax law exam. It will not show up on the certifications screen.

Home My Learning Certifications Volunteer Agreement Search Search catalog

Certifications

Filters Relevance Subject



01 - Basic

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by VITA/TCE Central

669 learners

Bookmark



02 - Advanced

The 2024 Advanced certification includes: the 'Volunteer Standards of Conduct Test', the 'Intake/Interview and Quality Review Test', and the 'Advanced Test'. Training documents are available for Volunteer Standards of Conduct and Intake/Interview and Quality Review .

by VITA/TCE Central

977 learners Certificate

Bookmark

Take your Intake/Interview & Quality Review Test

- Select "**Start**" to take the Intake/Interview & QR test.

[< Back](#)

Program

02 - Advanced

Created by Link & Learn Taxes

Provides certificate



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[Start](#)

Program content



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by VITA/TCE Central

3718 learners

Updated

[Start](#)



Intake/Interview and Quality Review - Test

SPEC requires all instructors, coordinators, client facilitators, return preparers, quality reviewers and any volunteer assisting taxpayers in completing Form 13614-C, Intake/Interview and Quality Review Sheet, and/or assigning tax returns to preparers to pass the Intake/Interview and Quality Review test with a scor...

by VITA/TCE Central

[Start](#)

Your Next Steps

- **Complete your first two tests:** Volunteer Standards of Conduct and Intake/Interview & Quality Review are required for all volunteers.
- **Attend Training Parts A & B:** Register using the link in the video description. Greeters and intake volunteers are encouraged to attend, too!
- **Earn your tax preparer certification:** To prepare returns, you must pass the Basic or Advanced exam. We encourage all preparers to pursue Advanced certification.

Preparing for the tax preparer certification tests

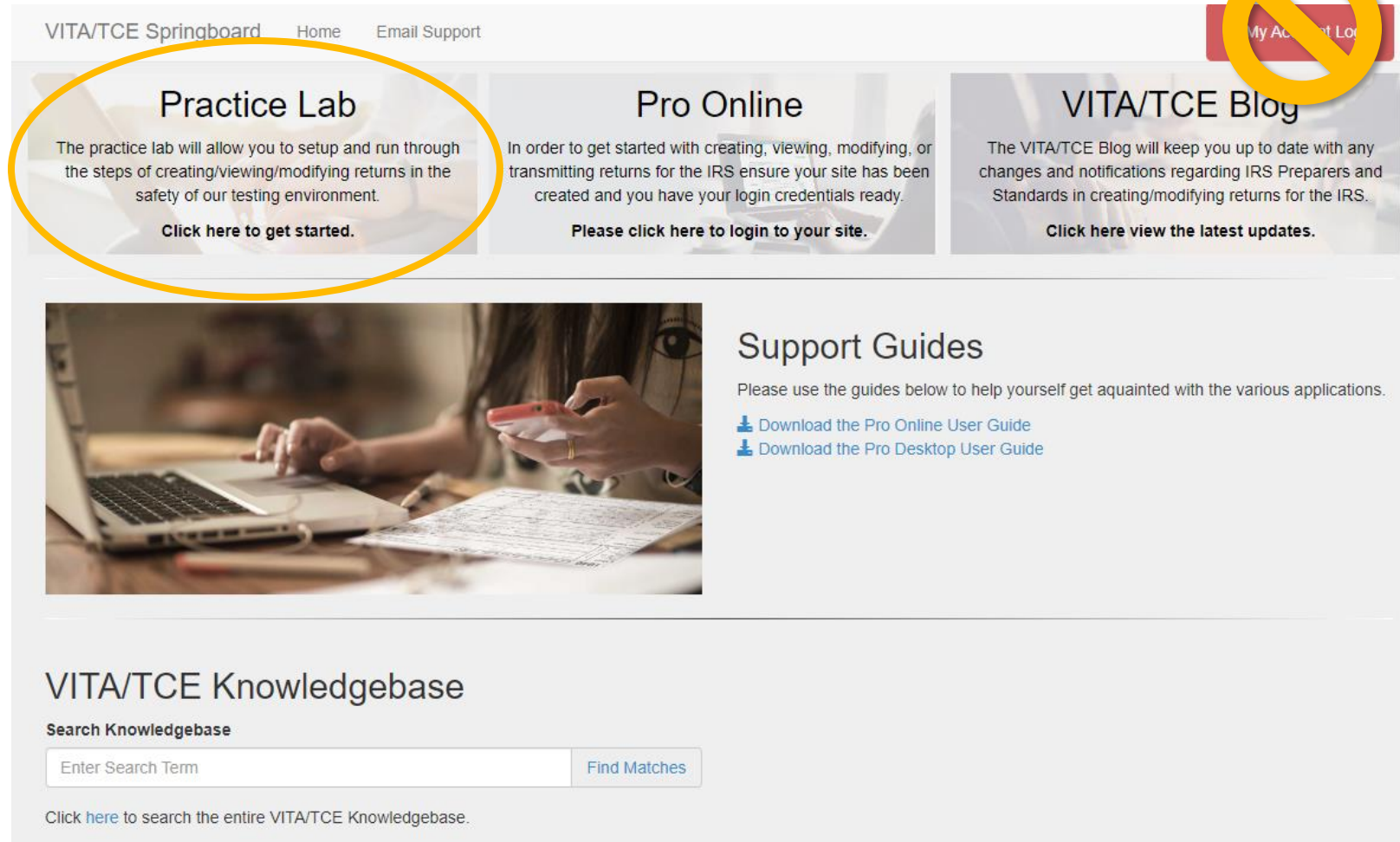
- The **Basic and Advanced exams** include scenarios that require you to prepare practice tax returns.
- **TaxSlayer Pro** is the software we use to prepare returns at our tax sites.
- Its **Practice Lab** lets you work through training and certification scenarios while becoming familiar with the software.

Let's set up your Practice Lab account!

Accessing TaxSlayer Practice Lab

- Go to <https://vita.taxslayerpro.com/>

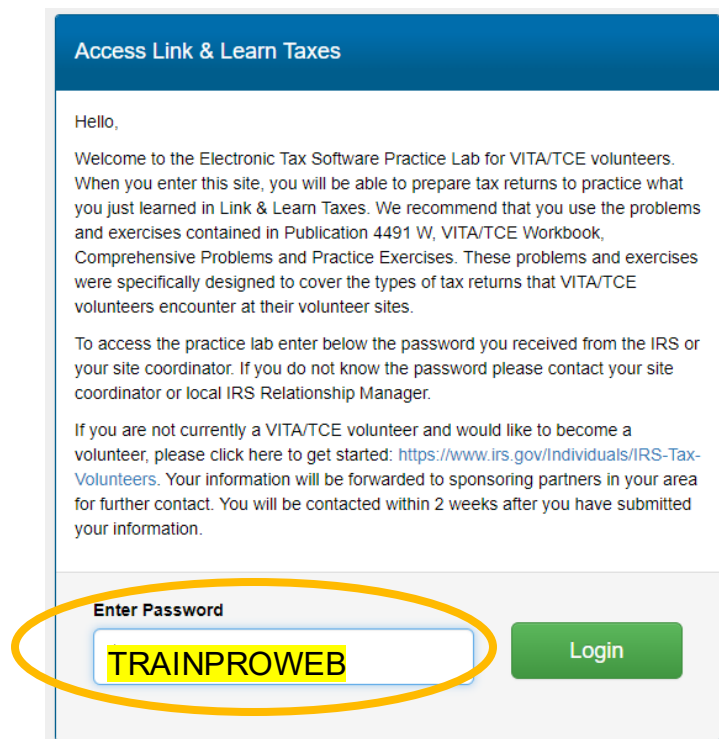
- Click **Practice Lab**



The screenshot shows the VITA/TCE Springboard website. The navigation bar at the top includes links for "VITA/TCE Springboard", "Home", and "Email Support". On the right, there is a red button labeled "My Account Log Out" which is crossed out with a yellow circle and a diagonal line. The main content area features three columns: "Practice Lab", "Pro Online", and "VITA/TCE Blog". The "Practice Lab" column is highlighted with a yellow oval and contains the text: "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." The "Pro Online" column contains the text: "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." The "VITA/TCE Blog" column contains the text: "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." Below these columns is a section titled "Support Guides" with a photograph of a person using a laptop and a smartphone. It includes the text: "Please use the guides below to help yourself get acquainted with the various applications." and two links: "Download the Pro Online User Guide" and "Download the Pro Desktop User Guide". At the bottom is a "VITA/TCE Knowledgebase" section with a search bar labeled "Search Knowledgebase" containing the placeholder text "Enter Search Term" and a "Find Matches" button. Below the search bar is the text: "Click here to search the entire VITA/TCE Knowledgebase."

Accessing TaxSlayer Practice Lab

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.

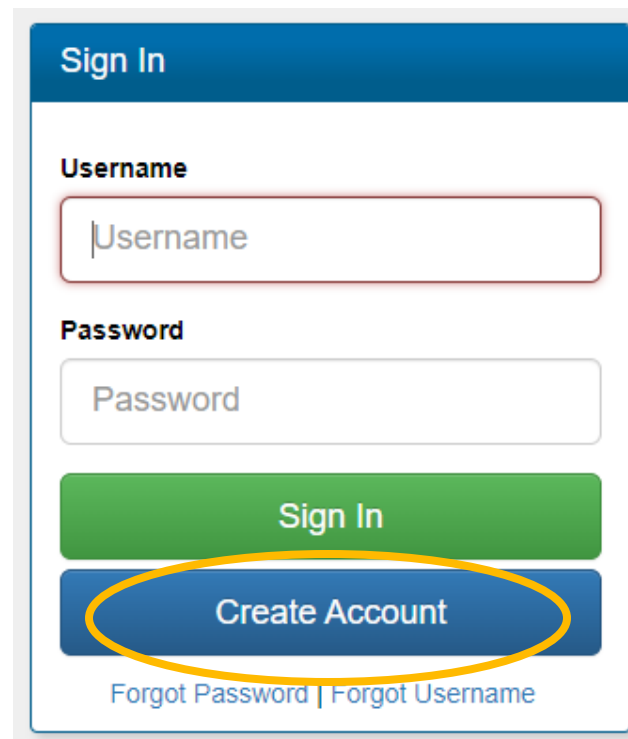
Enter Password

TRAINPROWEB

Login

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

Email Address

Confirm Email Address

Required

Username

Password

Confirm Password

Program Type

Please Select

← VITA

Site Identification Number (SIDN)

← Skip this field

Password Recovery

Security Question

Please Select a Question

Security Answer

Create Account

IMPORTANT: Use the 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 »](#)

CLICK HERE

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.

IRS Guides and Resources – Hardcopy Pickup

- We order enough hard copies of IRS training materials for all volunteers to have their own copy.
- In late November, materials will be available for pick up at:
 - United Way of Greater Cincinnati (2400 Reading Rd., Cincinnati, OH 45202), Monday-Friday 8:30am-12:00pm and 1:00pm-4:30pm.
 - Center for Great Neighborhoods (321 W MLK Blvd., Covington, KY 41011), Monday-Thursday 9:00am-5:00pm, and Friday 9:00am-12:00pm.
 - The Care Center (11020 S Lebanon Rd, Loveland, OH 45140), Tuesday-Friday 10:00am-6:00pm
- [IRS Pub 4012](#) and [IRS Pub 6744](#) are also 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 Setting Up Accounts?

- For assistance or question(s) reach out to:
 - freetax@uwgc.org
 - Include your name, e-mail, and phone, and nature of your question.

OR

- Join us for office hours:
 - Nov. 5 – 10-11 a.m.
 - Nov. 17 – 12-1 p.m.
 - Dec. 3 – 2-3 p.m.
 - Dec. 15 – 12-1 p.m.
 - Jan. 7 – 12-1 p.m.

Join office hours





UNITED WAY
Greater Cincinnati