United We Thrive

New Volunteer Tech Training

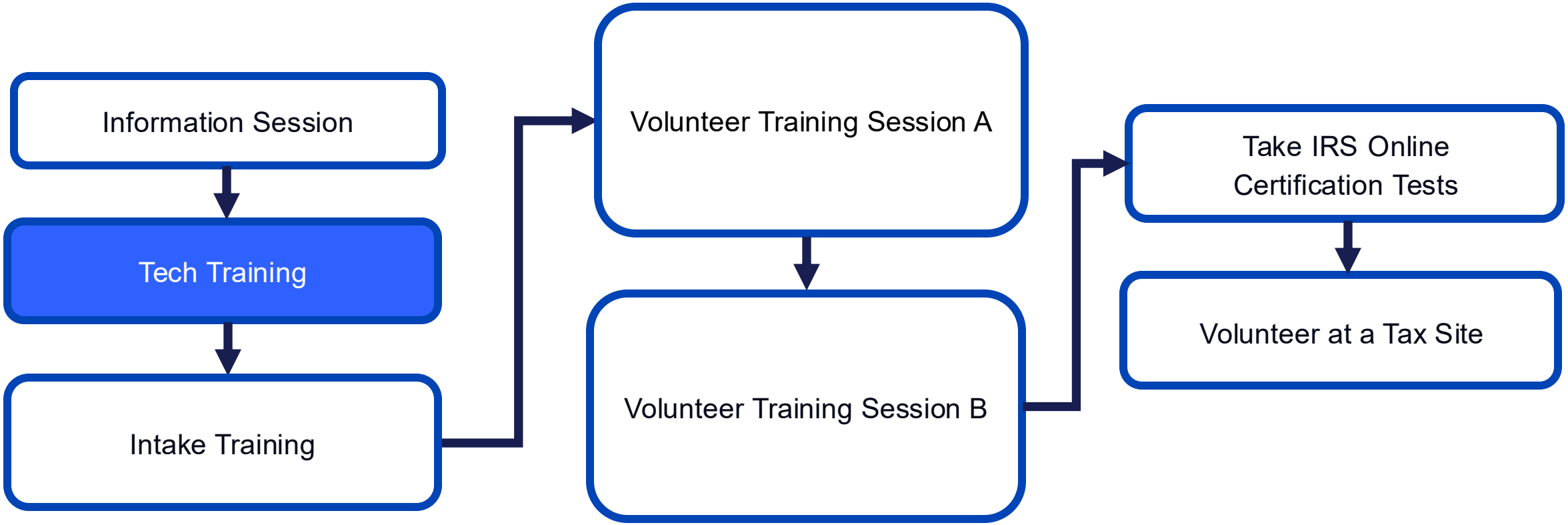
2027

UNITED WAY
Greater Cincinnati

Agenda

Your Volunteer Pathway
Training Resources
Sign Up For Training & Join Mobilize
IRS Certification: Account Set Up & Required Tests
TaxSlayer Practice Lab: Getting Started
Additional Resources & Support

Volunteer Pathway



Optional:
Returning Volunteer Training

Optional:
Special Topics Training

Optional:
State Taxes Training

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

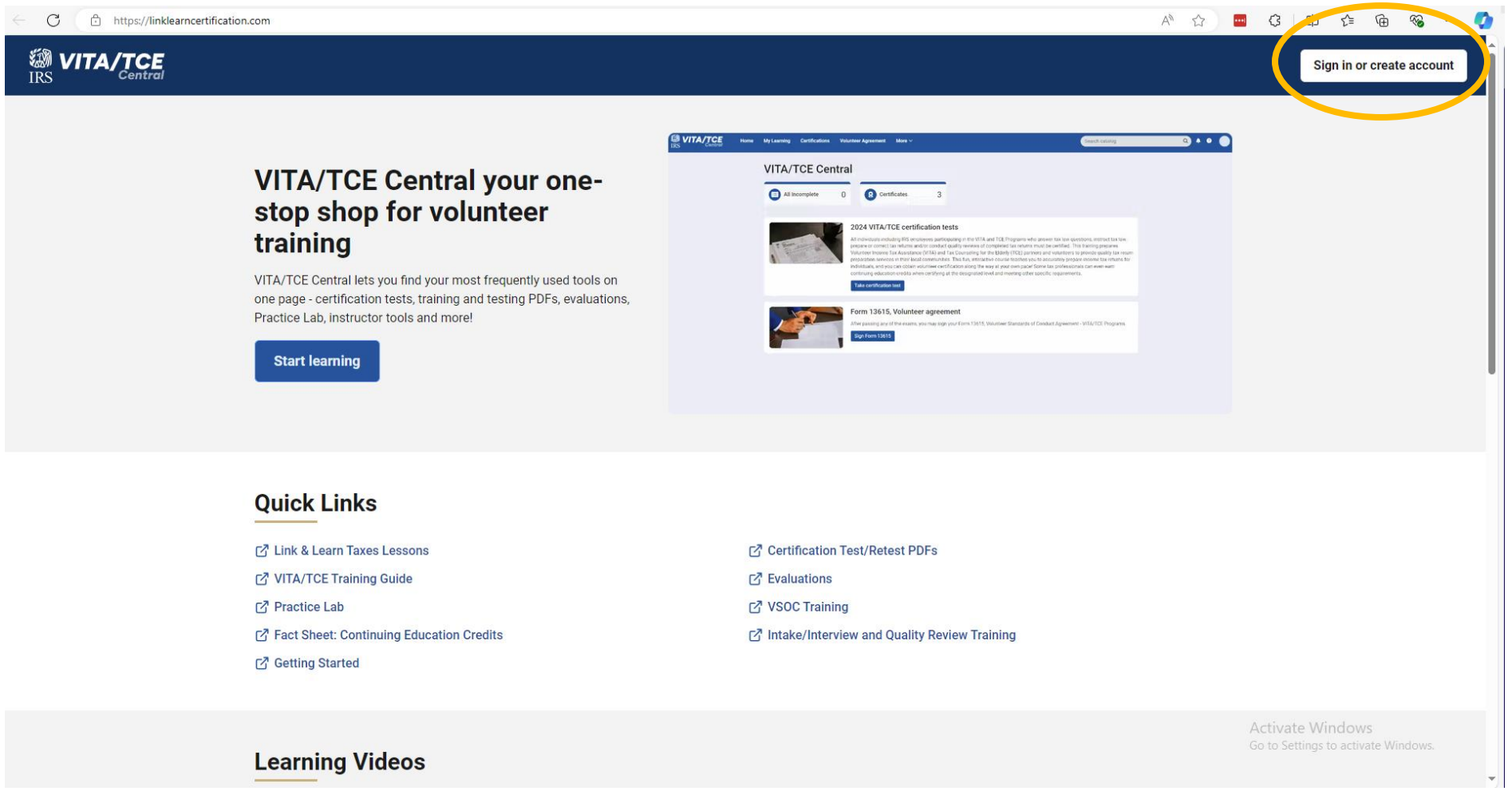
VITA/TCE Central: Account Set Up

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

Click Here

VITA/TCE Central

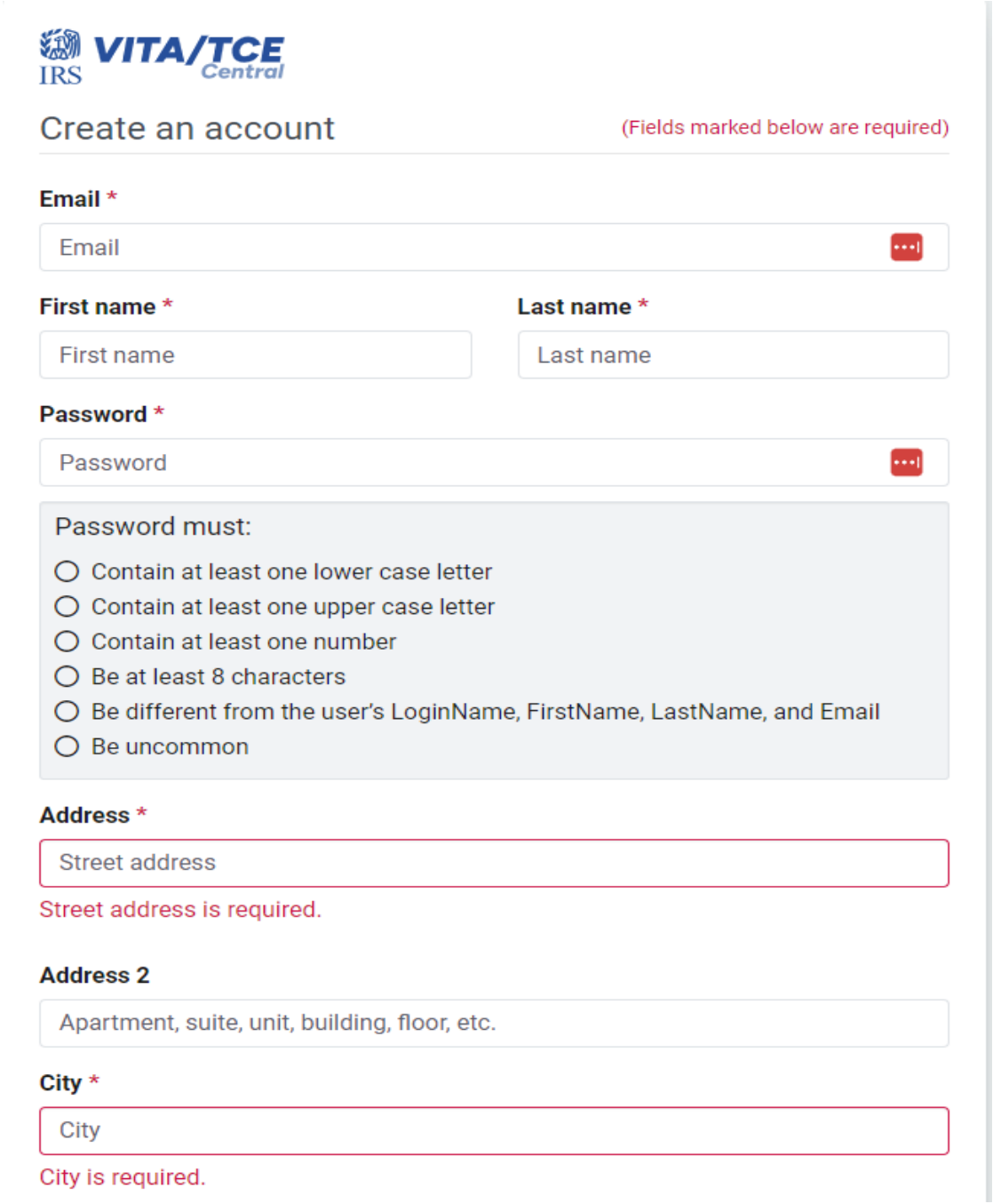
VITA/TCE Central: Landing Page



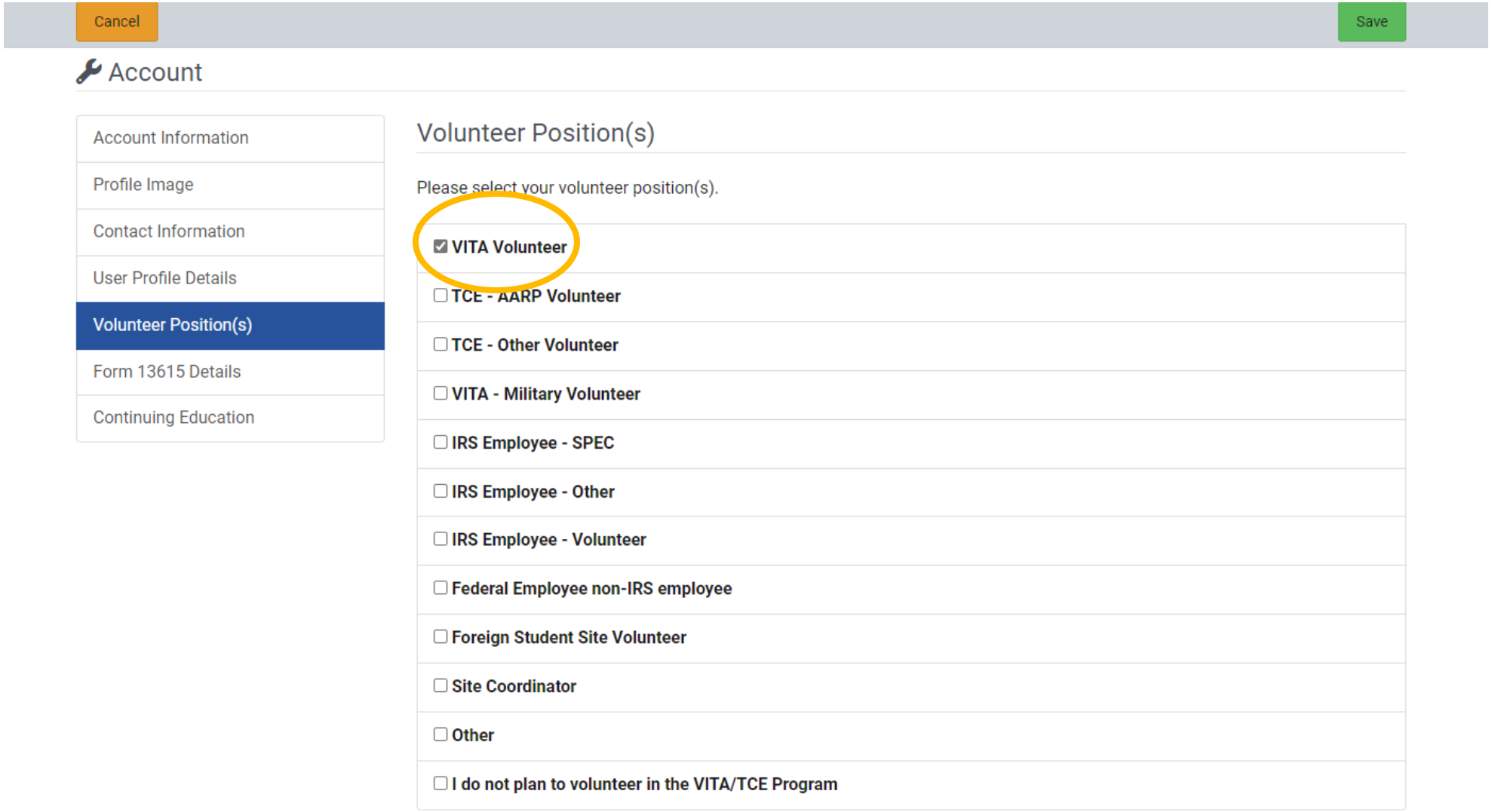
VITA/TCE Central: Account Set Up

Important:

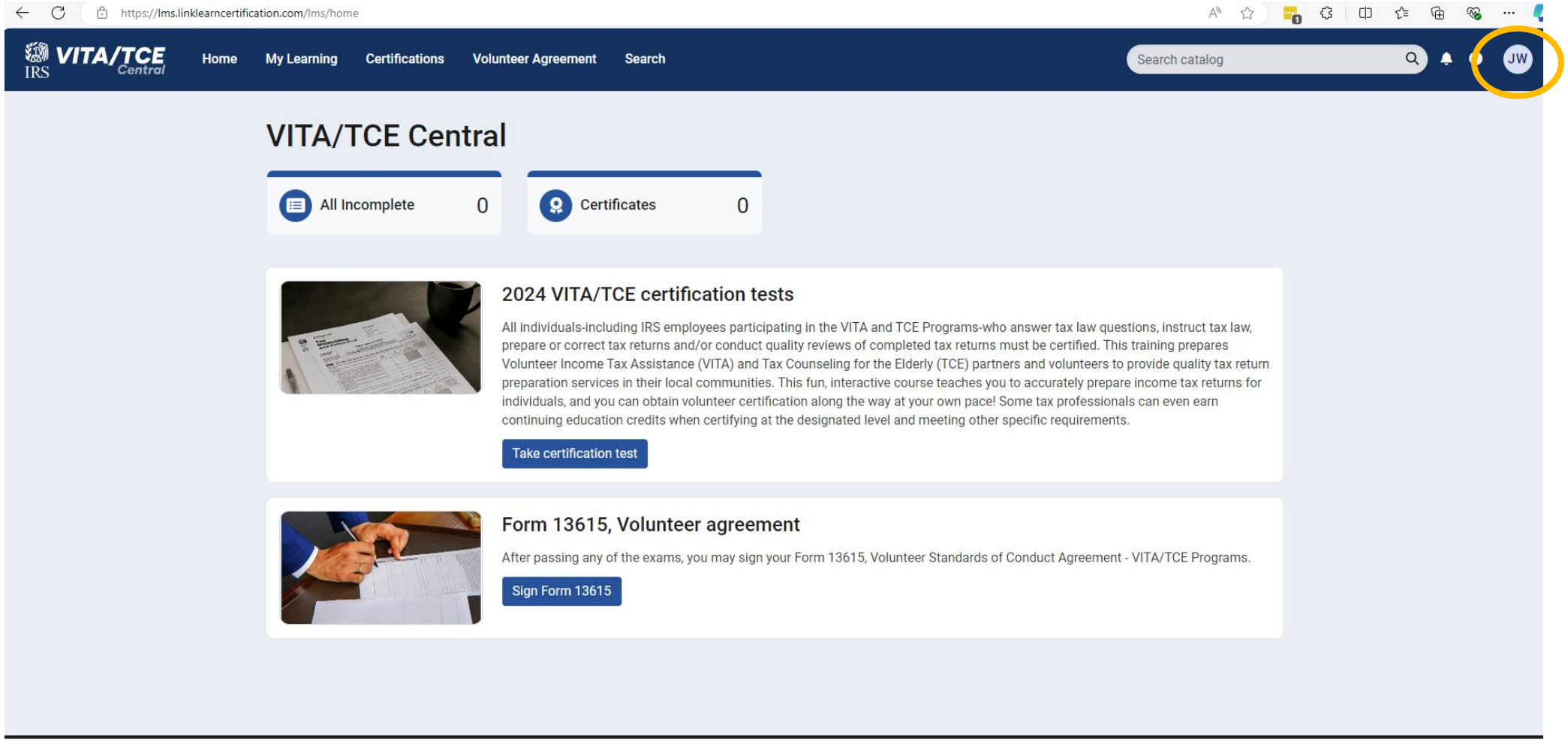
- Your name should match your driver's license.
- Use your password sheet to record the password you just created!



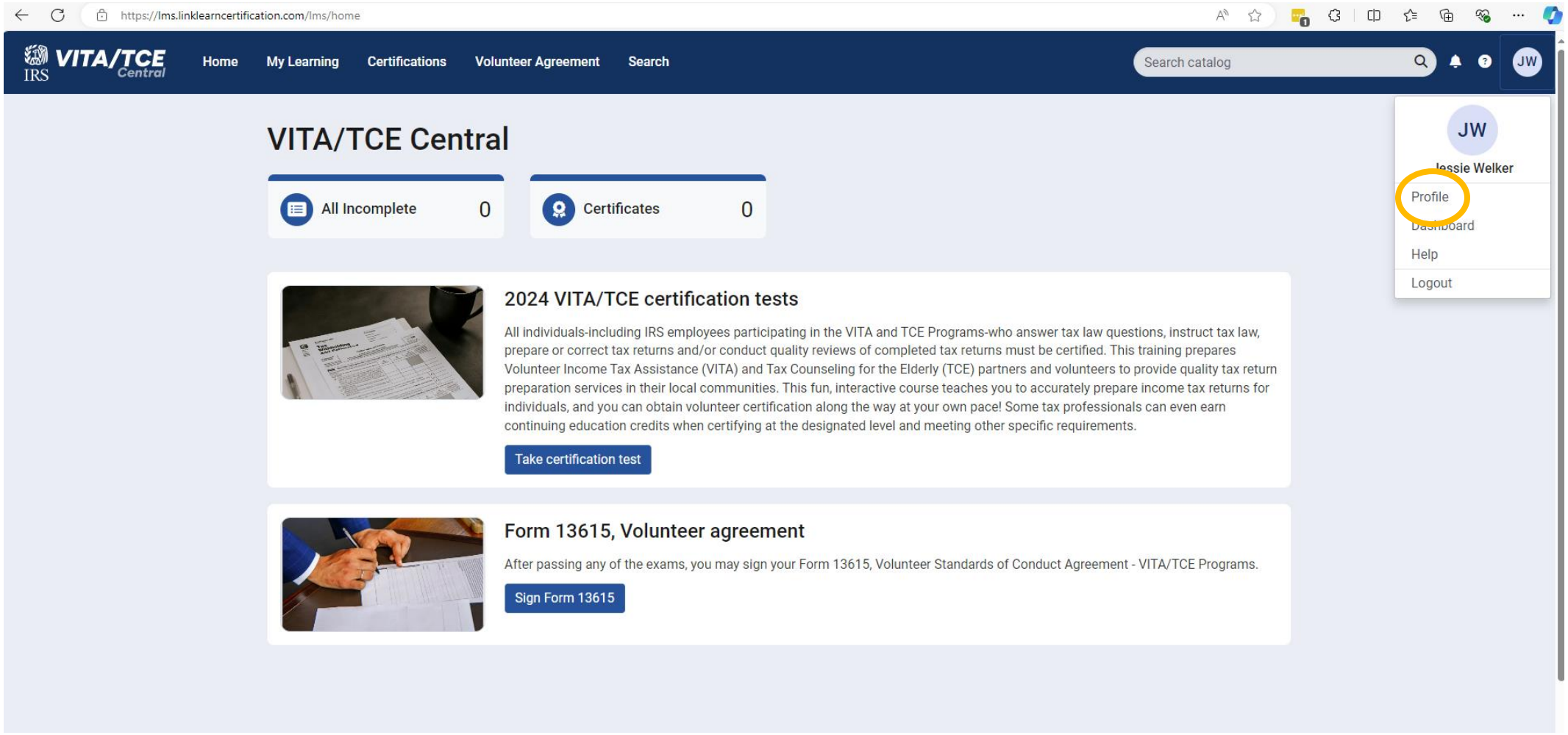
VITA/TCE Central: Account Set Up



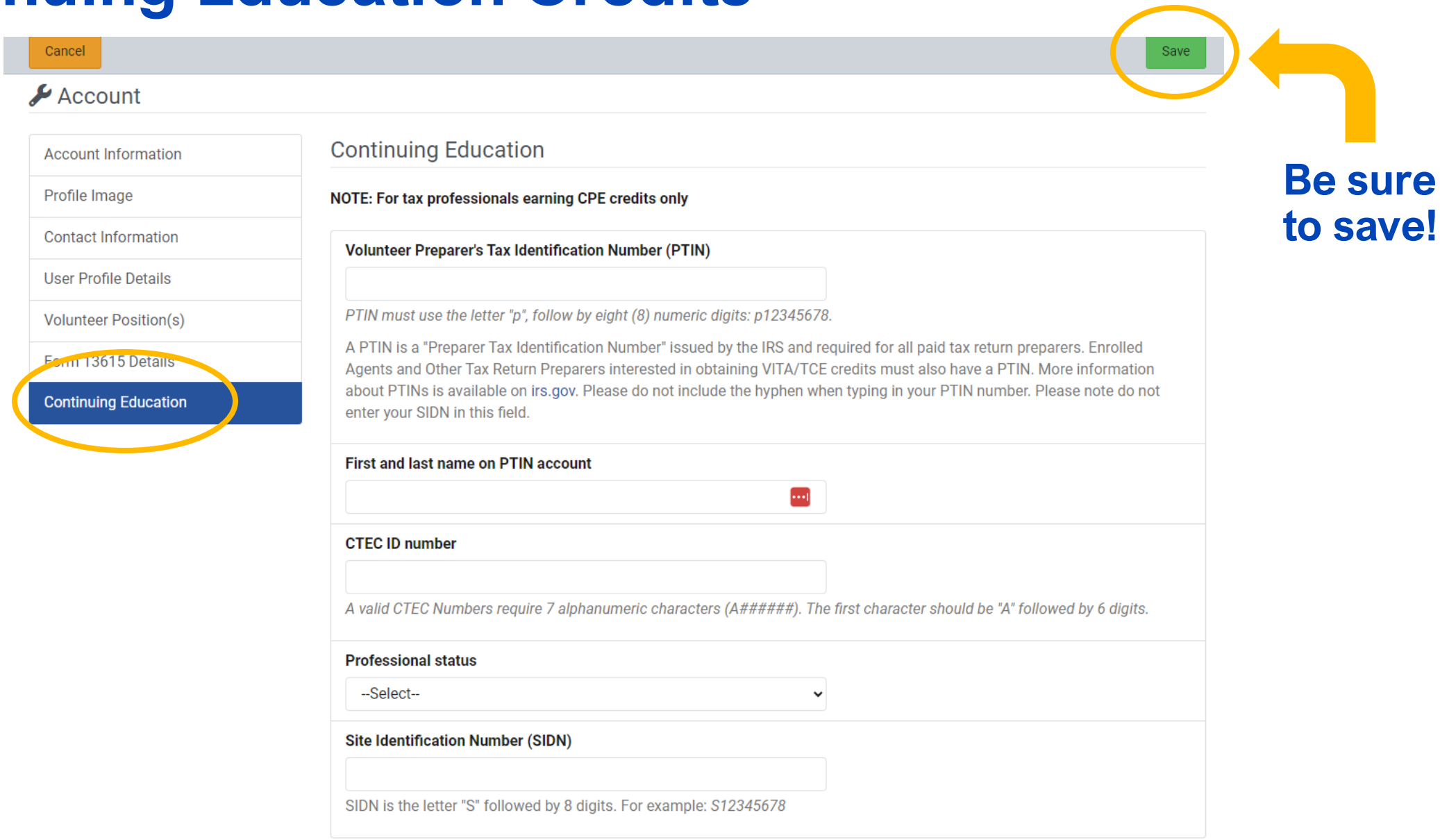
Earning Continuing Education Credits



Continuing Education Credits



Continuing Education Credits



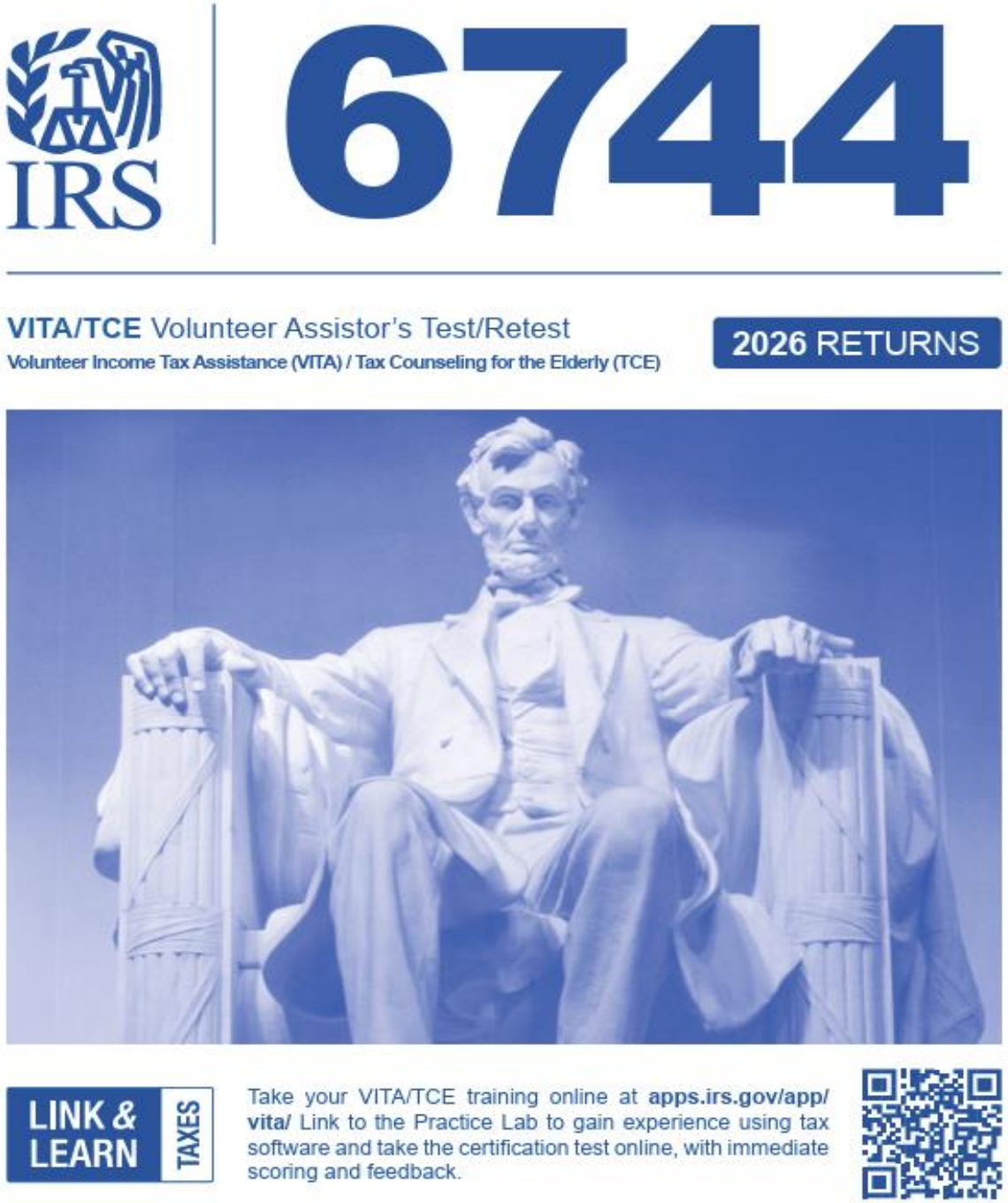
Be sure to save!

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**



IRS Pub 6744 VITA Test Booklet

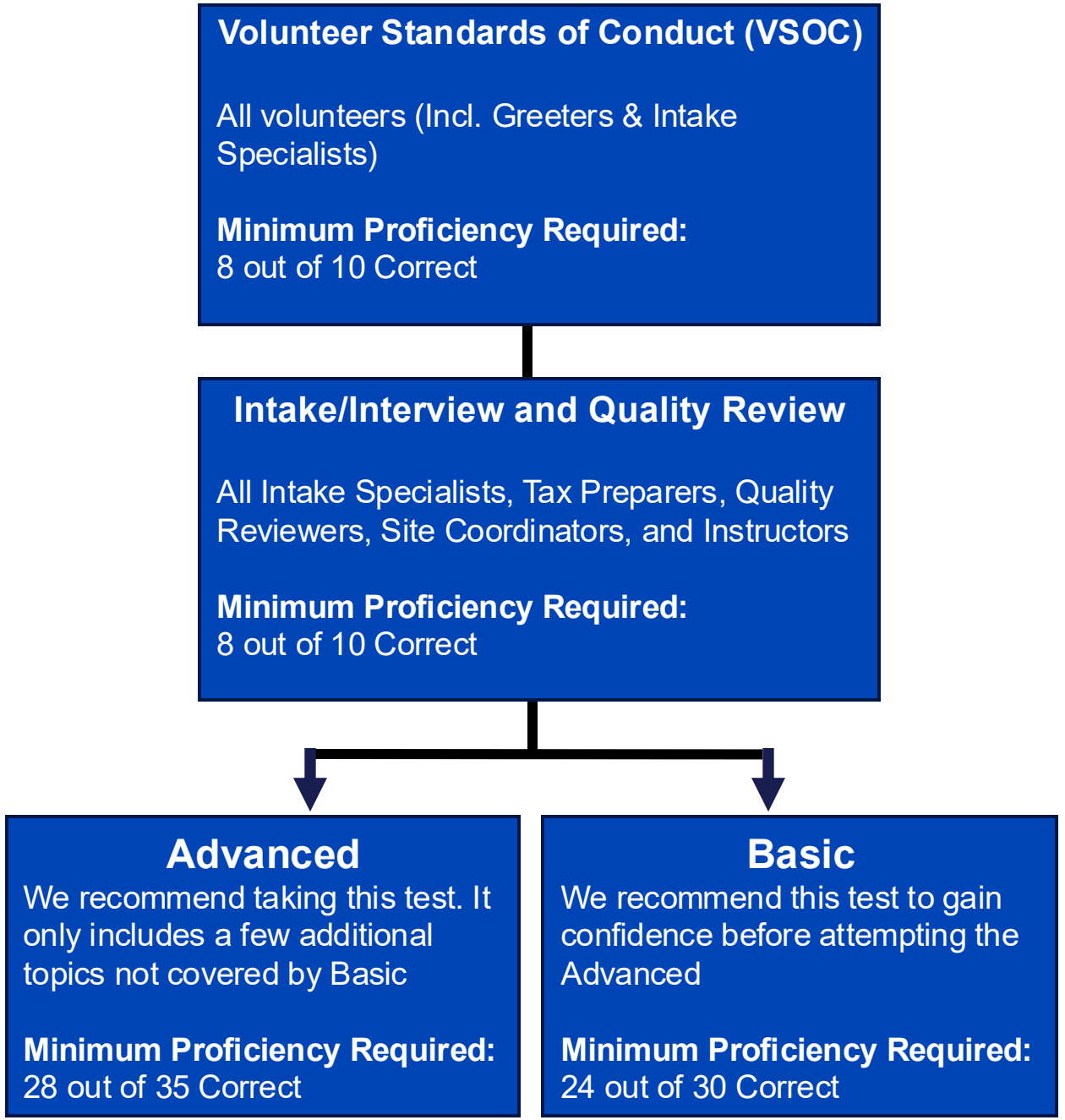
- **Don’t Panic** – we don’t take all the tests

- **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.



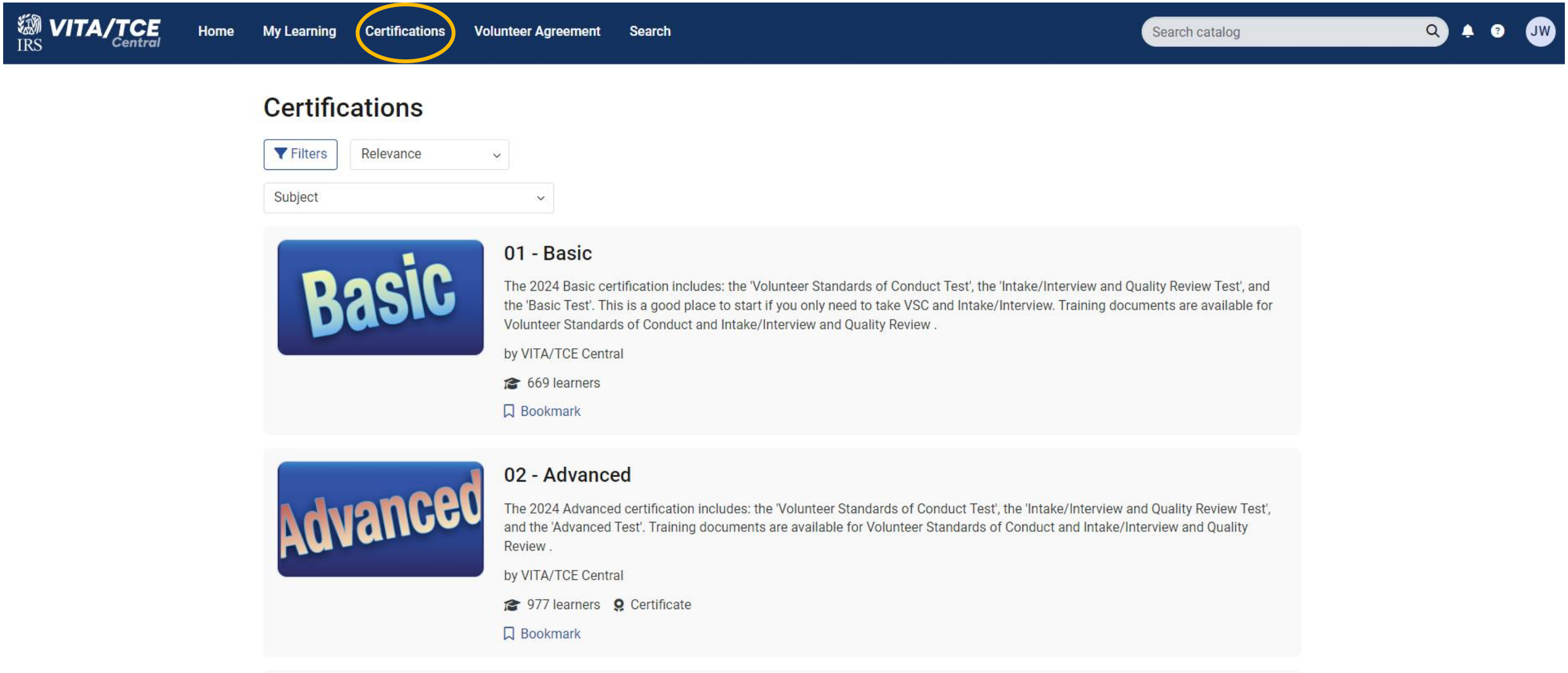
Your First Test: Volunteer Standards of Conduct

- 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.

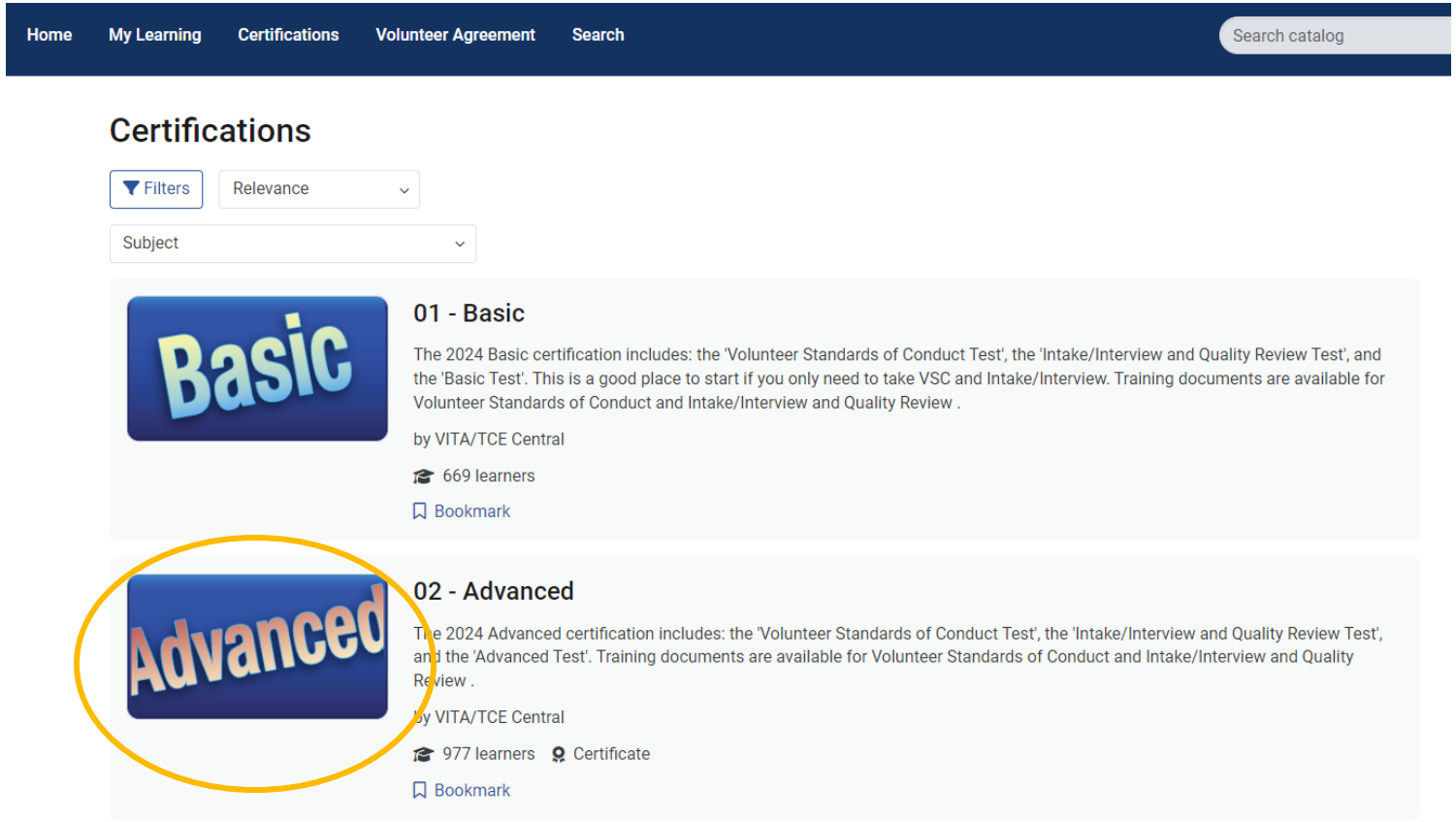
Accessing Your Certification Tests



Accessing Your Certification Tests

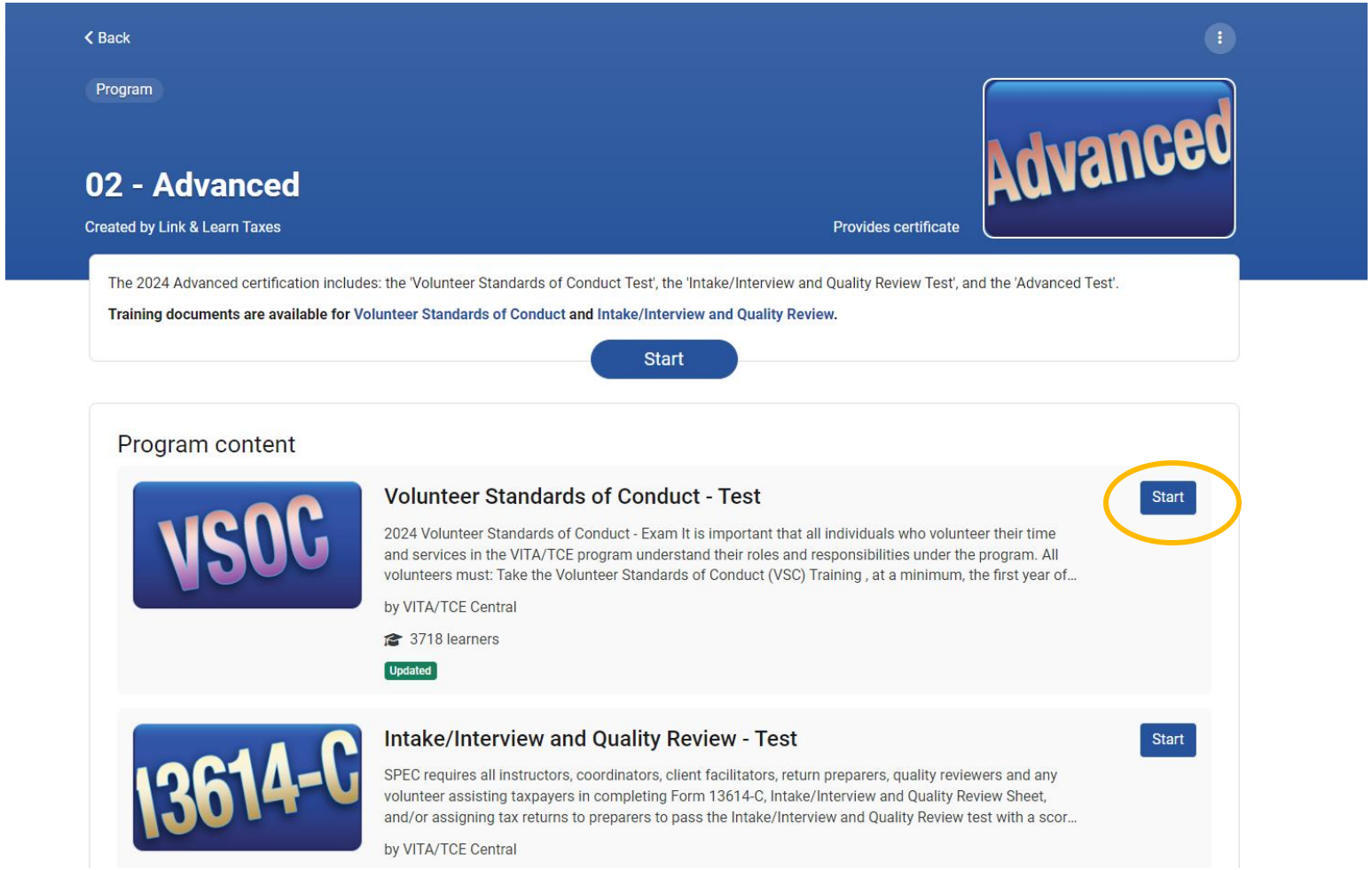
- Select **02 – Advanced**
  (this does not lock you into taking the advanced test)

- The VSOC test is only available after selecting a tax law exam. It will not show up on the certifications screen.



Take your VSOC Test

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



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.

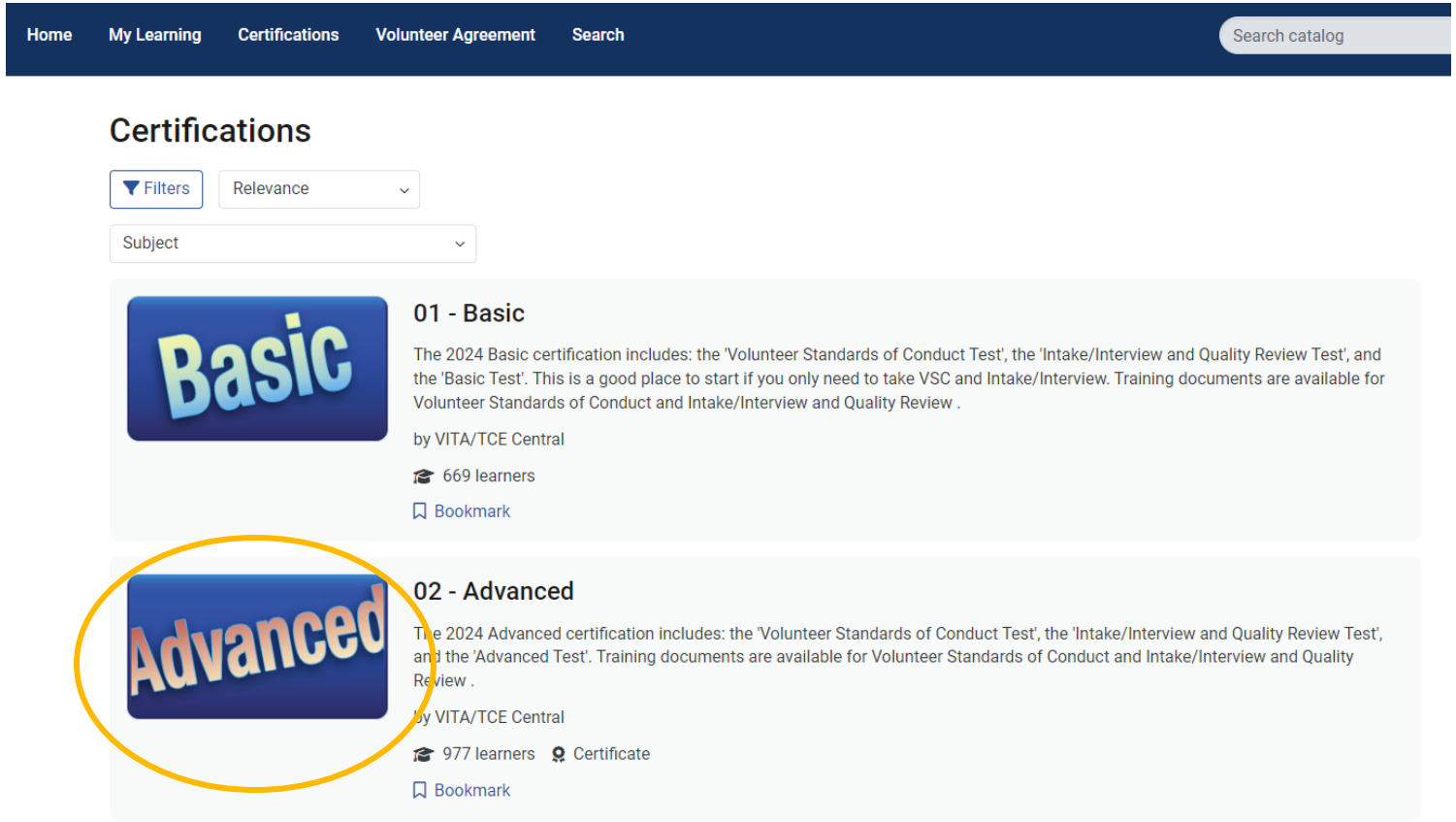
- **Prepare:** Review IRS Pub 5838, pages 3–15.

- **Preview the questions:** See IRS Pub 6744, page 21.

Accessing Your Certification Tests

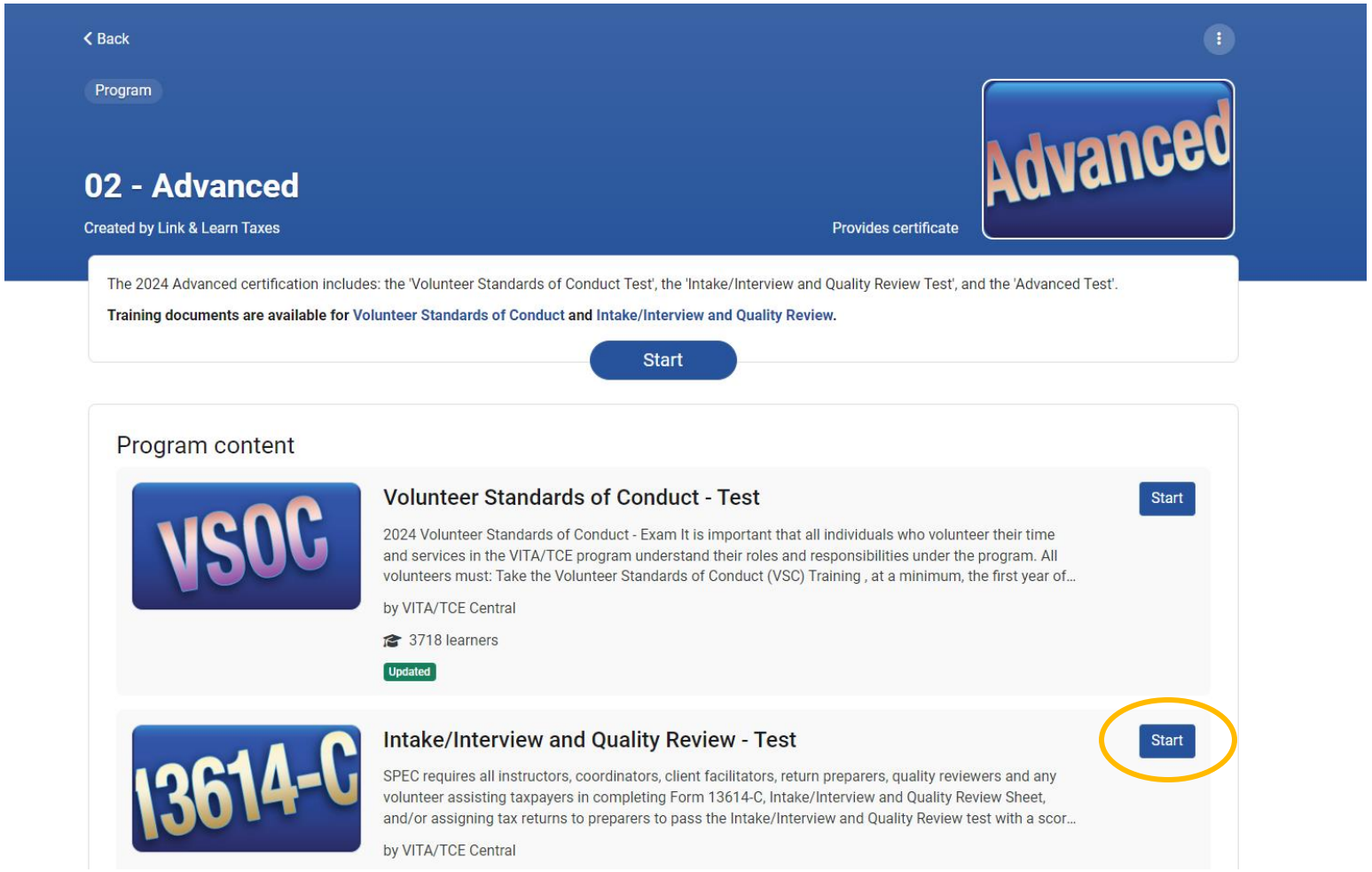
- Select **02 – Advanced**
  (this does not lock you into taking the advanced test)

- The Intake/Interview & Quality Review test is only available after selecting a tax law exam. It will not show up on the certifications screen.



Take your Intake/Interview & Quality Review Test

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



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.

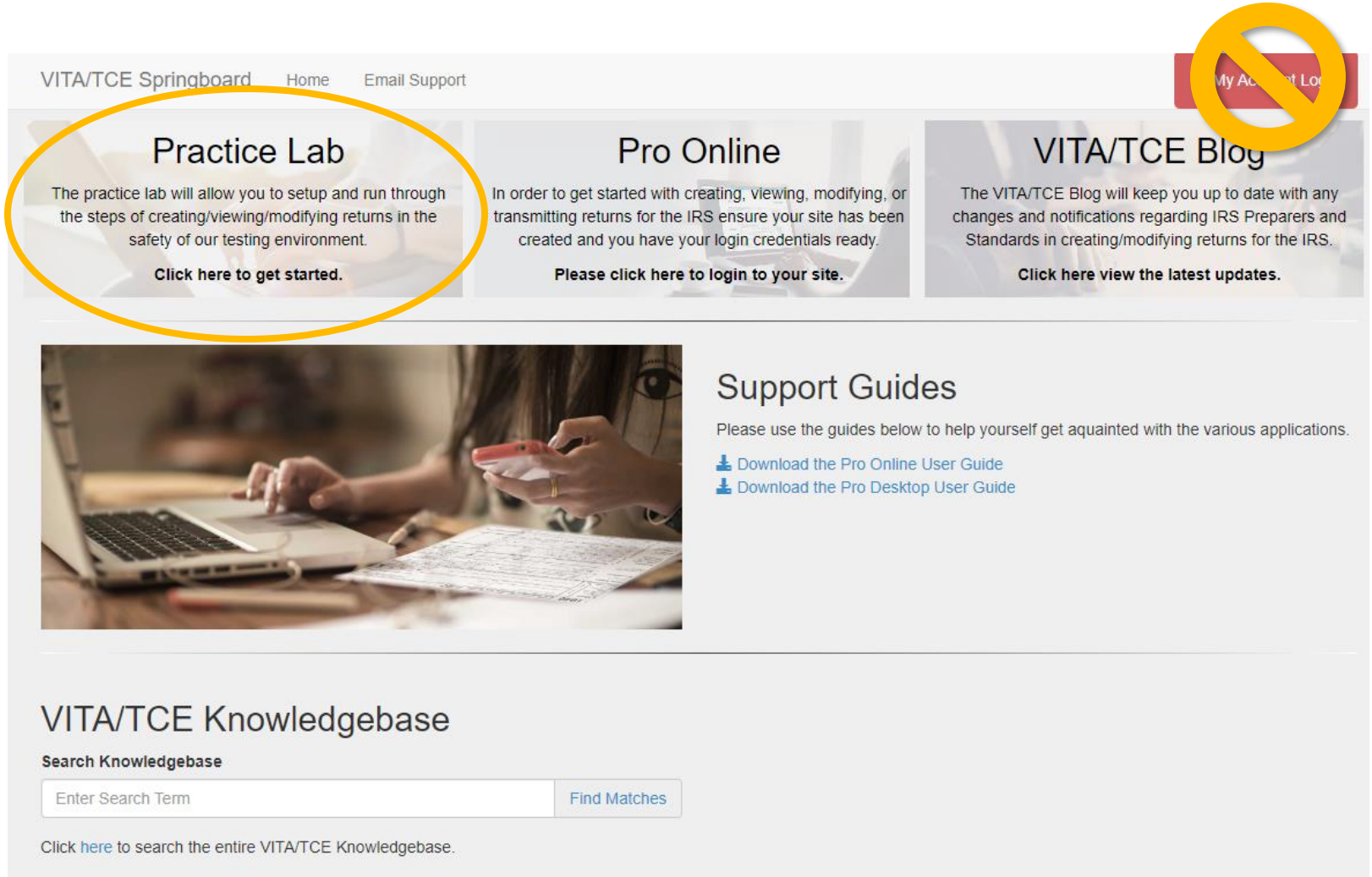
- Its **Practice Lab** lets you work through training and certification scenarios while becoming familiar with the software.

Let’s set up your Practice Lab account!

Accessing TaxSlayer Practice Lab

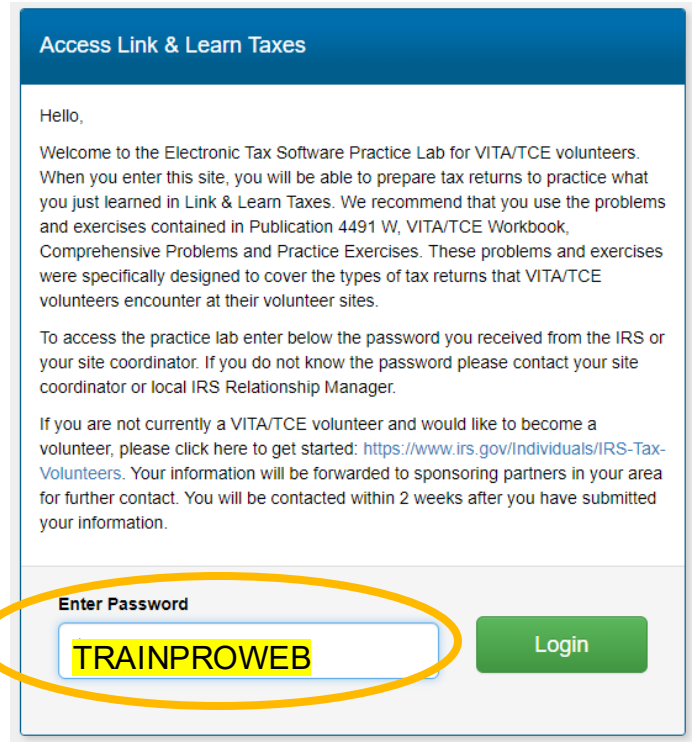
- Go to
  🔗 https://vita.taxslayerpro.com/

- Click **Practice Lab**

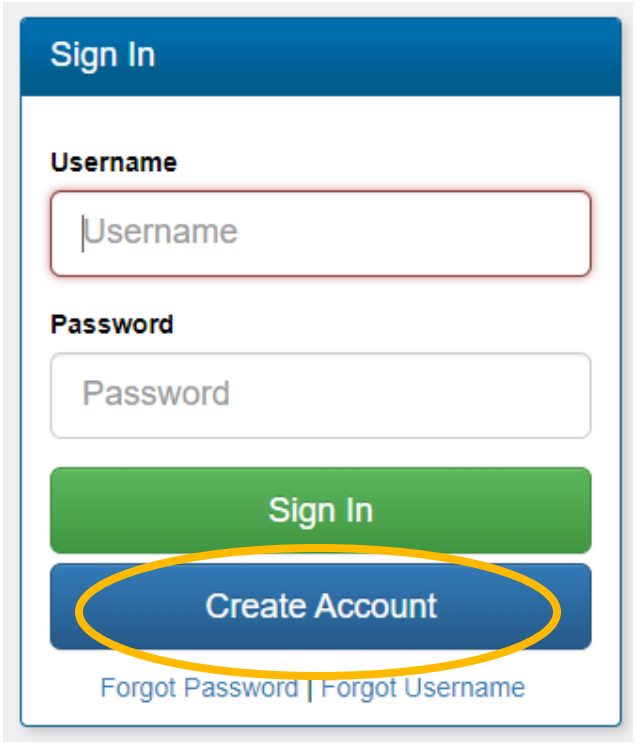


Accessing TaxSlayer Practice Lab

FIRST do this:



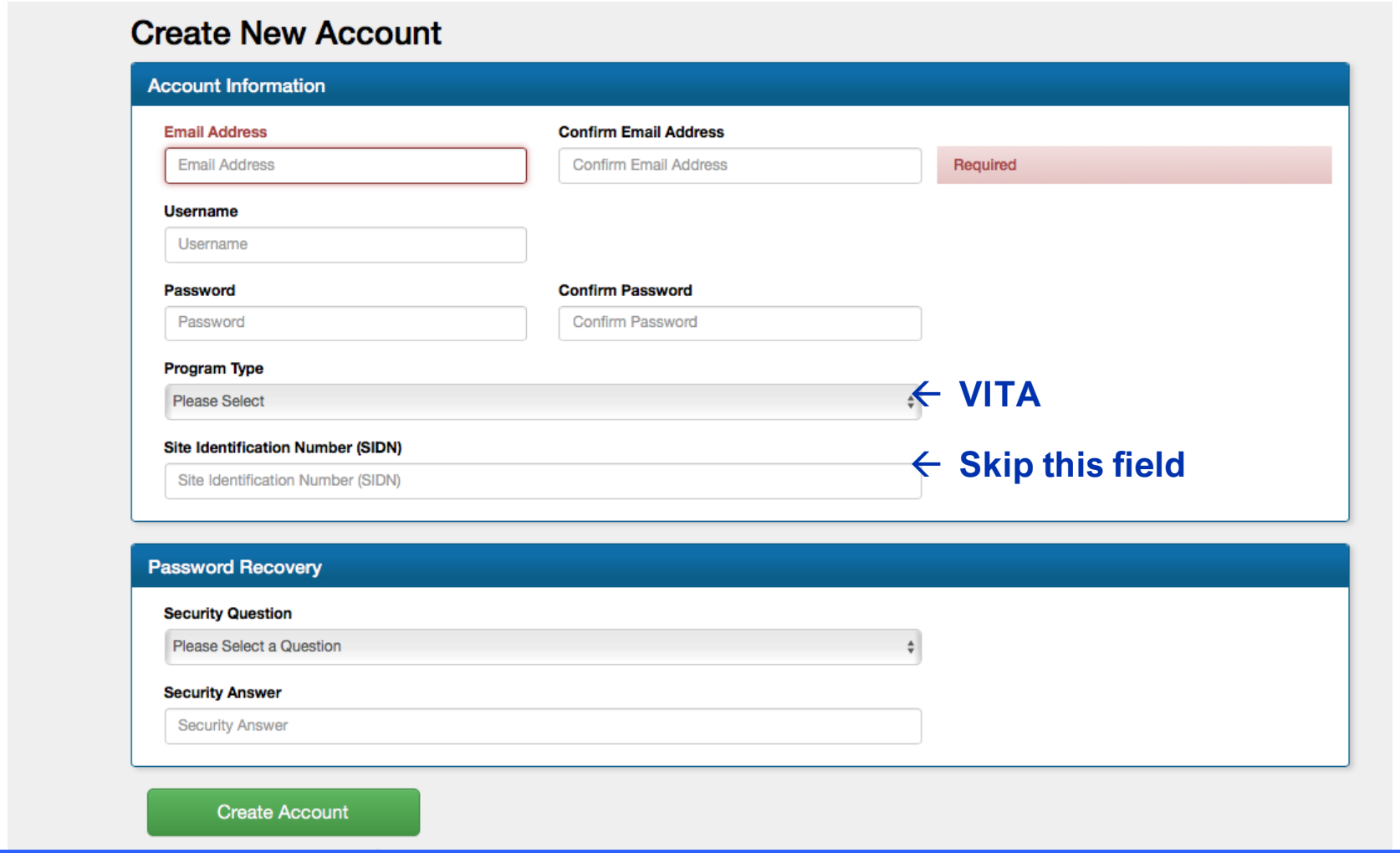
THEN do this:



Enter “TRAINPROWEB”

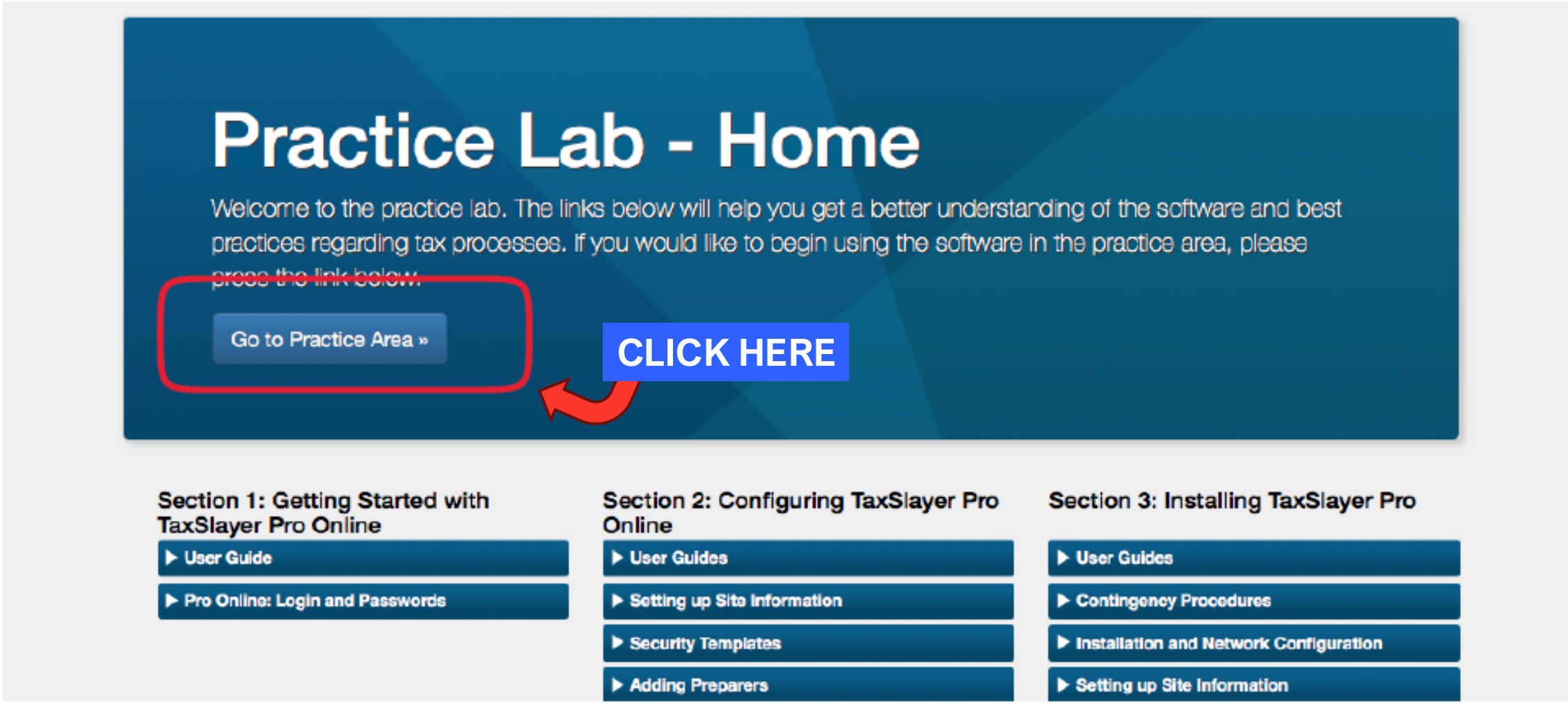
Click “Create Account”

Create TaxSlayer Account



IMPORTANT: Use the password sheet to record the User ID and password you just created!

Practice Lab: home page



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

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Greater Cincinnati