

IRS VITA Certification Tutorial 2021



IRS Training Resources

Publication 4012 | VITA Volunteer Resource Guide: <https://www.irs.gov/pub/irs-pdf/p4012.pdf>

- ❖ This guide assists you in preparing accurate returns and includes step-by-step instructions for electronic return preparation using TaxSlayer.

Publication 6744 | VITA Volunteer Test/Retest Booklet: <https://www.irs.gov/pub/irs-pdf/f6744.pdf>

- ❖ This publication includes the questions and scenarios that you will find on the certification exam.
 - ✓ Volunteer Standards of Conduct Test: 13-16 **REQUIRED**
 - ✓ Volunteer Standards of Conduct Agreement (Form 13615): pg. 20-21 **REQUIRED**
 - ✓ Intake/Interview Test: pg. 23-24 **REQUIRED**
 - ✓ Basic Exam: pg. 33- 62 **REQUIRED**
 - ✓ Advance Exam: pg. 71-108

IRS Basic Course: https://apps.irs.gov/app/vita/basic_student.jsp?level=basic

- ❖ This is an IRS site that goes through every VITA tax law topic for your review.

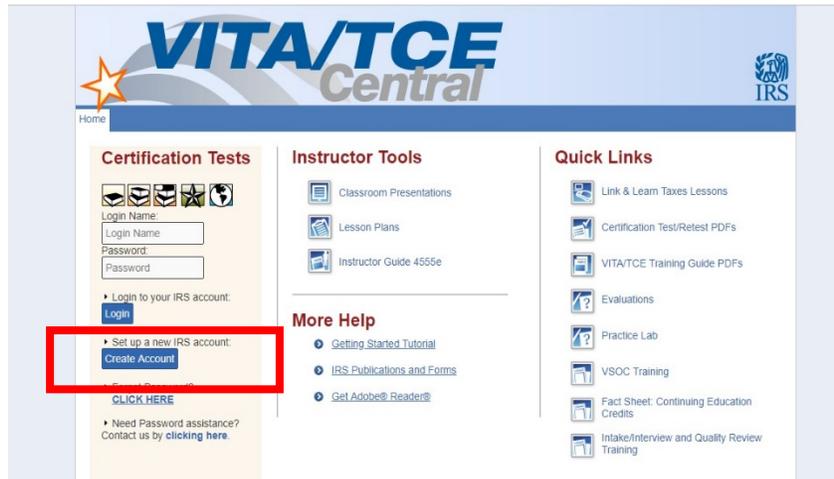
TaxSlayer Practice Lab: <https://vita.taxslayerpro.com/IRSTraining/en/Account/Access>

- ❖ This site allows volunteers to familiarize themselves with the TaxSlayer tax prep software and practice preparing mock tax returns. Volunteers should also use the Practice Lab to assist them with the certification exam scenarios.
 - ❖ Enter the universal password: **TRAINPROWEB** (all capitals, no spaces)
 - ❖ If you have an existing account in the TaxSlayer Practice Lab, enter your username and password and select “sign in.” (This is not the same username used on Link & Learn Taxes.) Otherwise, follow instructions in Step 3 below to create an account.
 - ❖ Select “Go to Practice Area” to start a new mock return.

VITA Certification Steps

Step 1: Create an IRS Certification Account

1. Once you are ready to take the VITA Certification Exams, go to www.linklearncertification.com.
2. On the left-hand side of the page, under “Set up a new IRS account”, click “**Create Account**”



3. Create your account using the information below:

- ✓ Q: Group
A: **01 – VITA Volunteer**
- ✓ Q: Do you want to take the Site Coordinator certification?
A: **No**
- ✓ Q: Are you an Instructor?
A: **No**
- ✓ Q: Are you an IRS SPEC Territory Manager?
A: **No**
- ✓ Q: Do you plan to volunteer in the VITA/TCE Program?
A: **Yes**
- ✓ Q: Training Source
A: **Link and Learn Taxes (e-learning)**
- ✓ Q: First Name
A: **Your LEGAL First Name** (New York Cares recognizes and values that volunteers may use names other than their legal name to identify themselves. This might include people who use their middle name instead of their first name, people who use nicknames of a legal name, people who use an anglicized name, or people who use a name that affirms their gender identity. New York Cares will continue to use the preferred names that volunteers provide to us. However, for this VITA certification process, the IRS requires that volunteers use their legal name as it would appear on any of their government-issued documents.)

- ✓ Q: Last Name
A: **Your LEGAL Last Name**
- ✓ Q: SEID
A: **Keep Blank**
- ✓ Q: Login
A: **Create a Personal Login**
- ✓ Q: Password
A: **Create Personal Password**
- ✓ Q: Email Address
A: **Your email address**
- ✓ Q: Address
A: **Your Address**
- ✓ Q: Time Zone
A: **GMT-04:00 Atlantic Time (Canada)**
- ✓ Q: Partner/Organization Name
A: **Keep blank**
- ✓ Q: Years You Have Volunteered
A: **Number of years you have been a tax prep volunteer**
- ✓ Q: Professional status for Continuing Education credits or Circ 230 ONLY
A: **Do not change – keep “Select role for CE Credits”**
- ✓ Q: PTIN Number
A: **Keep blank**
- ✓ Q: Name as listed on PTIN Card
A: **Keep blank**
- ✓ Q: CTEC Number
A: **Keep blank**

4. Click “Register”
5. Log in with your newly created Login Name and Password. If you forget your password, enter your email address and the website will send you a new one.

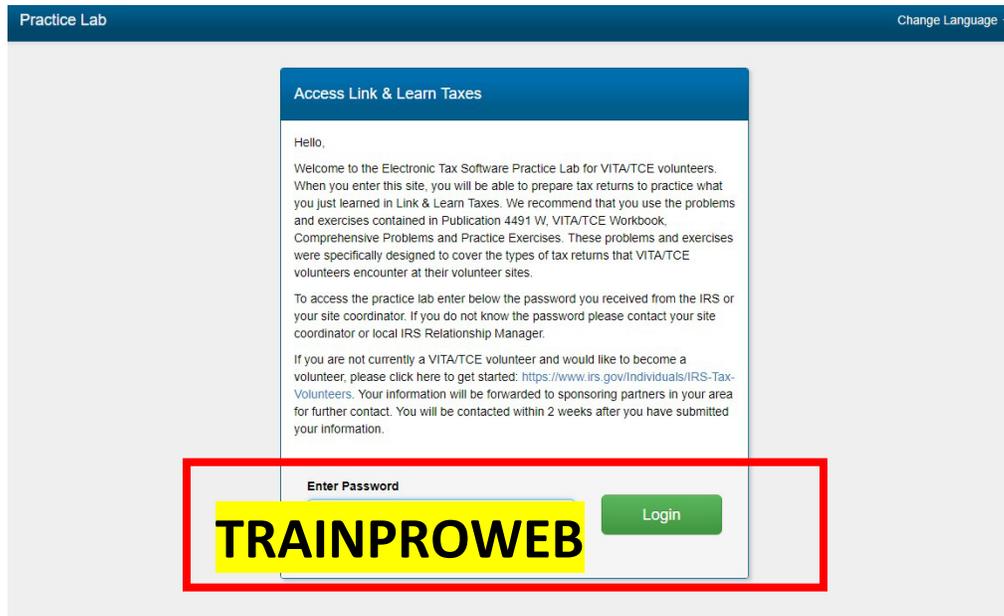
Step 2: Start Your Exams

6. Select the certification course of your choice: **Basic** or **Advanced**
7. Complete “**2020 Volunteer Standards of Conduct Exam**”
8. Complete “**2020 Intake/Interview and Quality Review Exam**”
9. Start “**2020 Basic Exam**” (or “2020 Advance Exam” if you want to certify at a higher level)
10. Continue until Basic Scenario 6 **AND STOP!** (You will need to use Practice Lab to help you answer Scenarios 6, 7, and 8)

Step 3: Create Practice Lab Account



11. Log in to the Practice Lab:
<https://vita.taxslayerpro.com/IRSTraining/en/Account/Access>
 - ❖ Practice Lab lets you prepare mock tax returns for the exam and extra practice
 - ❖ Use the Practice Lab to help you complete your Basic or Advance Exam
12. Enter the universal password: **TRAINPROWEB** (all capitals, no spaces)



13. Click "Create Account."
 - ❖ This will be a Practice Lab account. It is a separate account with a different username/password from the IRS Link & Learn Certification account in Step 1.
14. Create your account using the information below:
 - ✓ Q: Email Address
A: **Your email address**

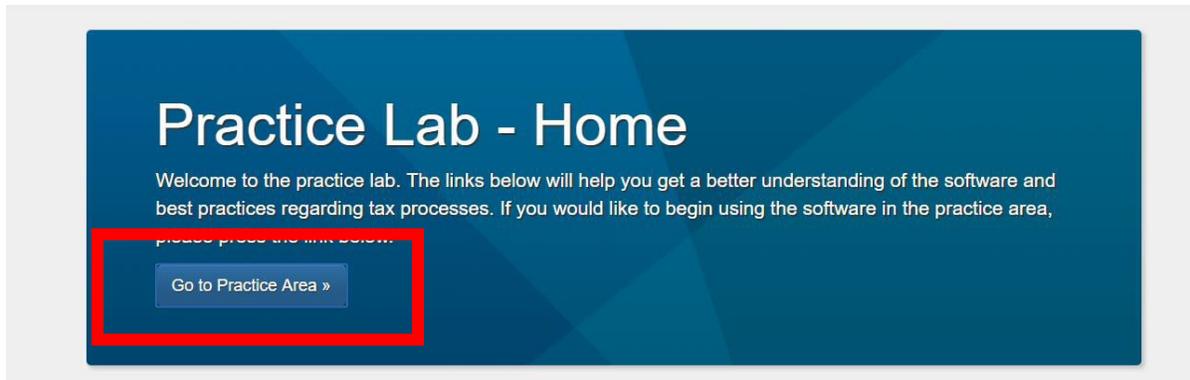
 - ✓ Q: Username
A: **Create a personal username** (this may be different from the IRS Link & Learn Taxes account)

 - ✓ Q: Password
A: **Create a personal password** (your password must be 15 characters and use uppercase, lowercase, number, and a special character such as (!@#\$\$%))

 - ✓ Q: Program Type
A: **VITA**

- ✓ Q: Site Identification Number (SIDN)
A: **Leave Blank**
- ✓ Choose a security question and answer so that you can recover your account if you forget your password
- ✓ Click "Create Account"

15. Click "Go to Practice Area" near the top of the page



16. Click "Select" next to "Start New 2020 Return"
17. Click "Start Return"
18. Enter Scenario 6 data and Scenario 6 tax documents
 - ❖ To view the final tax return, click on "summary" on the left-hand side to view the 1040. It will highlight some of your Scenario 6 answers
19. Go back to Link & Learn testing site (www.linklearncertification.com) and answer questions for Scenario 6 in your "**2020 Basic Exam**"
20. Next, in Practice Lab, create a new return and enter Scenario 7 data and tax documents
 - ❖ To view the final tax return, click on "summary" on the left-hand side to view the 1040. It will highlight some of your Scenario 7 answers
21. Go back to Link & Learn testing site (www.linklearncertification.com) and answer questions for Scenario 7 in your "**2020 Basic Exam**"
22. Next, in Practice Lab, create a new return and enter Scenario 8 data and tax documents
 - ❖ To view the final tax return, click on "summary" on the left-hand side to view the 1040. It will highlight some of your Scenario 8 answers
23. Go back to Link & Learn testing site (www.linklearncertification.com) and answer questions for Scenario 8 in your "**2020 Basic Exam**"
 - ❖ Remember you need to answer 80% of the questions correctly.
 - ❖ You have two chances to pass the exam

24. After completing the exam, you will see your score



2015 VITA/TCE Certification Test My Account

Basic Advanced Military International Puerto Rico Foreign Student

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	
2015 Volunteer Standards of Conduct - Exam	100.00 %	Pass Print Certificate	1	<input checked="" type="checkbox"/> You may sign your Volunteer Agreement electronically by checking this box Sarah Nylund 11/19/2015
2015 Intake/Interview and Quality Review Exam	100.00 %	Pass Print Certificate	1	
2015 Basic Exam	100.00 %	Pass Print Certificate	1	Click here to open and complete your Volunteer Agreement. Click Print from the file menu to print the page.
2017 Health Savings Accounts (HSA) Exam			0	Save the Volunteer Agreement for your records. 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.

↑
Not required

Step 4: Finishing Up

25. Check off the box on the right side to sign your Volunteer Agreement electronically.
26. Fill out a Volunteer Agreement (Form 13615) shown above (red box on the right).
27. Save a copy of your Certifications and Volunteer Agreement, Form 1365.
28. **Email PDFs of your certifications and Volunteer Agreement Form 1265 to tax.prep@newyorkcares.org and your team leader.**
29. If you will be serving at an on-site shift, print out a copy of your certification documents and bring to your first tax shift.