

# VITA VOLUNTEER TRAINING MANUAL

You are about to make a real difference in peoples' lives!  
We hope you are as excited as we are.

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Save your login information for your two online training accounts: (passwords are case sensitive)

## VITA Central (VITA/TCE Central)

Login Name: \_\_\_\_\_ Password: \_\_\_\_\_

### Practice Lab

Password to enter Practice Lab: TRAINPROWEB

Login Name: \_\_\_\_\_ Password: \_\_\_\_\_

Security Question: \_\_\_\_\_

## How To Use This Guide

This guide is designed to walk you through the certification process so you can be a VITA volunteer. It will describe where, and how, you must create online accounts. It will provide a list of relevant materials you need to have access to. It will outline how to take your various certification exams. Lastly, it will make clear what you must complete prior to volunteering at our VITA sites.

## What Type Of Certifications Do The Different Volunteer Roles Require?

### Greeters

Greeters must complete: 1) the Volunteer Standards of Conduct; and 2) Intake Interview & Quality Review Training. Please complete Steps One, Two, and Three, as outlined in this guide, ***prior*** to your first classroom session.

### Volunteer Tax Preparers

**\*\*Please be aware that volunteers are required to supply their own laptops for classroom training sessions\*\***

All Miami-Dade VITA Volunteer Tax Preparers **MUST BE ADVANCED CERTIFIED**. This means all tax preparation volunteers must complete: 1) the Volunteer Standards of Conduct; 2) Intake Interview & Quality Review Training; and 3) Advanced Exam Certifications.

\*Military, HSA, and International Certifications are optional.

### Site Coordinators

Site Coordinators have four certification requirements: 1) VSOC; 2) Intake/Interview & Quality Review; 3) Either Advanced or Circular 230 Tax Professional Certification; and 4) Site Coordinator Certification and are required to attend a separate classroom training. See page 12 for details of how to complete your Site Coordinator Certification.

### CPA's, Attorneys, and Enrolled Agents

Because of your professional designation, you have a choice of certification paths. If you:

1. Want to be eligible for up to 18 Continuing Education (CE) Credits, you must complete a full Advanced Certification. Follow the instructions for "Advanced Certifications" in this guide.
2. Are not worried about CE Credits, you may use the *Circular 230 Federal Tax Law Update Test*. This process is explained in detail on page 12 of this manual.

*Hint: The Circular 230 Certification takes several hours, versus around 30 hours for a full Advanced Certification. Choose your option based on your comfort level with tax laws, and your desire to get CE Credit.*

## STEP ONE: Getting Started

### A. VITA Central – <https://www.linklearncertification.com>

This site is actually called “VITA/TCE Central” (*VITA Central*). This is where you will access your online training modules called Link and Learn. You will also use this login to take your actual certification tests.

VITA Central looks like this:

### Creating a VITA Central Account

*\*If you were a VITA volunteer last year you may be able to use your existing login information.  
If not, create a new account.*

Click **Create Account** – Instructions for each entry are below:

1. Volunteer Group – Select “01 - VITA Volunteer”
2. If you are interested in being a Site Coordinator, select “YES” for the Site Coordinator Course
3. Login – This will be your username
4. Password: This will be a password you create
5. Training Source – Select Publication 4491
6. Time Zone – GMT – 05:00 Eastern Time (US & Canada)
7. Professional Status – **ONLY** select this if you are a CPA, Attorney, CFP, or Enrolled Agent.
  - a. Hint: Tax professionals must choose between this shorter certification process and being eligible for Continuing Education (CE) Credits. If you want CE credits do not select this option
8. If you have a PTIN enter it. Otherwise leave this blank.

## B. Practice Lab - <https://vita.taxslayerpro.com/IRSTraining>

This site is where you will practice using our preparation software - TaxSlayer Pro. You will also use this site to “prepare” the tax returns required for your certification exam.

1. Enter the password: TRAINPROWEB

*Hint: this is the generic password you will have to enter every time you want to access Practice Lab*

2. Select **CREATE ACCOUNT**
  - a. Program Type = VITA
  - b. SIDN: Leave this BLANK



## C. Download Your Training Materials

All training materials are available for download in easy to use PDF format. Please find below a list of some of the materials you should download for reference during your certification process:

1. VITA Training Guide – IRS Publication 4491
  - a. This is your main training guide and is essential to your certification process
2. VITA Problems and Exercises – IRS Publication 4491W
3. VITA Volunteer Resource Guide – IRS Publication 4012
  - a. This is what you will have at your VITA site to use as a reference in the field. Become familiar with it now to make it easier to use later.
4. VITA Volunteer Standards of Conduct – Ethics Training - IRS Publication 4961
5. VITA Intake/Interview & Quality Review Training – IRS Publication 5101
6. VITA Test Booklet – IRS Publication 6744
7. Your Federal Income Tax – IRS Publication 17

### [Step Two: Volunteer Standards of Conduct \(VSOC\)](#)

The material covered by the VSOC certification exam is contained within **Pub. 4961 – Volunteer Standards of Conduct – Ethics Training**. If you have not already done so, you can download this document here:

1. Go to *VITA Central*
  - a. \*do not login
2. Locate *VSOC Training* under *Quick Links*
3. Click to download the materials

2016 VITA/TCE Certification Test My Account					
	Circular 230	Basic	Advanced	Military	International
Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)		
<a href="#">2016 Volunteer Standards of Conduct - Exam</a>	100.00 %	Pass <a href="#">Print Certificate</a>	1		
<a href="#">2016 Intake/Interview and Quality Review Exam</a>	100.00 %	Pass <a href="#">Print Certificate</a>	1		
<a href="#">2016 Site Coordinator Training</a>	Complete	<a href="#">Print Certificate</a>	N/A		
<a href="#">2016 Advanced Exam</a>			0		
<a href="#">2016 Health Savings Accounts (HSA) Exam</a>			0		

### Taking the VSOC Certification Exam:

1. Login to *VITA Central*
2. Select the *Advanced* tab

- a. \*Tax Professionals pursuing a Circular 230 Certification should choose the Circular 230 tab
  - b. **DO NOT** select the Basic tab. *Advanced* includes *Basic*, you do not need to do both.
3. Select the *VSOC Exam*
- a. *Hint: all exams are open book. Use your reference materials!*

\*All potential Test and Retest questions are listed in Pub. 6744. Since the online exam chooses from both sets of questions randomly, we recommend you print out both, and complete each question on paper PRIOR to taking the online exam.

**\*\*You have only TWO attempts to score at least an 80% on this exam\*\***

### [Step Three: Intake/Interview and Quality Review Training](#)

The material covered by the Intake Interview and Quality Review exam can be found in **IRS Publication 5101 – Intake/Interview & Quality Review Training**. If you have not already done so, this publication can be found in the *Quick Links* section of *VITA Central*.

\*All potential Test and Retest questions are listed in Pub. 6744. Since the online exam chooses from both sets of questions randomly, we recommend you print out both, and complete each question on paper PRIOR to taking the online exam.

### **Taking the Intake/Interview and Quality Review Certification Exam:**

1. Login to *VITA Central*
2. Select the *Advanced* tab
  - a. \*Tax Professionals pursuing a Circular 230 Certification should choose the Circular 230 Tab
3. Select the *Intake/Interview and Quality Review Exam*.
  - a. *Hint: all exams are open book. Use your reference materials!*

**\*\*You have only TWO attempts to score at least an 80% on this exam\*\***

### [Tax Preparer Online Self-Study](#)

You can also complete your Advanced Certification process through online self-study. Our volunteers have found that having a set schedule for studying helped them. Below is a Self-Study Plan that you can use as a guide

You will have two types of sources you can choose to learn from. Feel free to use any combination of these two sources based on what works best for you:

1. Your VITA Training Guide (Pub. 4491) and
2. Online training modules (we refer to these as “Link and Learn” in this guide)

*Hint: The “courses” in your Pub. 4491 correspond to the e-learning modules in Link and Learn. Both cover the same material, but present it in different methods*

## How to Access *Link and Learn* e-learnings

1. Go to the *VITA Central* homepage
2. Select ***Link and Learn Tax Lessons*** under *Quick Links*.
  - a. \*You may have to “log out” of *VITA Central* to see the home page with *Quick Links*
3. You will see four tabs: Select 2. Certification Paths
4. Choose *ADVANCED*
5. Select *STUDENT*
6. Click *Start Advanced Course*

Many volunteers find it useful to use the following studying procedure:

1. Complete a lesson in Pub. 4491 and/or *Link & Learn* e-learnings
2. Go through the same topic in their Pub. 4012 to reinforce the concepts learned. This will also teach you how to use your Pub. 4012, which will be your reference guide at the tax site.

How to learn about TaxSlayer preparation software:

1. Login to your ***Practice Lab*** account
2. Use the lessons in *Section 4: Preparing a Return* to learn more about our preparation software
3. Also, watch Webinars 2 and 3 (Return Preparation Parts I and II). These are located under *Section 6: Enhancements and Miscellaneous*

### [Online Self-Study Plan for Advanced Certification](#)

Please use this page as a reference tool and planner for your personalized Study Plan. We have included a suggested schedule, but do not feel obligated to follow it. In general, you can expect to spend about 30 hours total on an Advanced Certification. Work at your own pace, and be sure you are learning the material.

Week	Courses to Complete	Pub. 4012 Section	Completed
1	<ul style="list-style-type: none"> <li>• VSOC Cert.</li> <li>• Intake &amp; QR Training</li> <li>• Pub. 4491 Part 1 – Getting Started</li> <li>• Pub. 4491 Part 2 – Determining Filing Status and Exemptions</li> </ul>	<ul style="list-style-type: none"> <li>• Pub. 4961</li> <li>• Pub. 5101</li> <li>• Pub. 4012 Tab A, B, C</li> </ul>	
2	<ul style="list-style-type: none"> <li>• Pub. 4491 Part 3 – Determining Taxable Income</li> </ul>	<ul style="list-style-type: none"> <li>• Tab D</li> </ul>	
3	<ul style="list-style-type: none"> <li>• Pub. 4491 Part 4 – Determining Adjusted Gross Income</li> <li>• Pub. 4491 Part 5 – Computing the Tax and Credits</li> <li>• Pub. 4491 Part 6 – Computing Other Taxes and Total Tax</li> </ul>	<ul style="list-style-type: none"> <li>• Tab E, F, G, H, J</li> </ul>	
4	<ul style="list-style-type: none"> <li>• Pub. 4491 Part 7 – Applying Refundable Credits and Computing Payments/Refunds</li> <li>• Pub. 4491 Part 8 – Completing and Filing the Return</li> <li>• Pub. 4491 Part 9 – Amending and Prior Year Returns</li> </ul>	<ul style="list-style-type: none"> <li>• Tab I, K, M</li> </ul>	
5	Take your Advanced Certification Exam!		



## Step Four: Taking Your Advanced Certification Exam

**Do not complete your Certification prior to Thanksgiving. If you do, you will have to re-certify on this year's exam.**

Once you are comfortable with all of the Advanced Certification content, and how to use the TaxSlayer preparation software, it is time to take your certification exam. Remember, these are open book exams, so be sure to use your reference materials at all times.

The exam will contain scenarios with sample taxpayer forms and information. Use your *Practice Lab* account to prepare returns based on the information provided in the scenarios:

1. Login to *Practice Lab*
2. Select *Go to Practice Area*
3. Prepare the return as required

We highly recommend printing out both the *Test* and *Retest* questions from your Pub. 6744 PRIOR to taking the online exam. Complete both the *Test* and *Retest* questions for each scenario as you reach them. By completing both sets of questions, you will be ready for any question "your" exam may choose.

Be sure to only use the ADVANCED COURSE SCENARIOS and RETEST questions.

Test Tips and How-To's:

- Be sure to enter ALL information given to you on any sample forms. Failure to enter information, no matter how minor, will cause you to get the answer wrong on the exam
- Replace the four X's in test Social Security Numbers and Employer Identification Numbers with any 4 numbers of your choice
- Always select "Guide Me" in TaxSlayer. This will help you input the information you are provided
- Your City, State, Zip literally means YOUR City, State, Zip. (E.g. Miami, Florida 33168)
- Ignore the fact that Florida does not have State Income tax. Enter ALL information provided on the sample forms.
- If the test asks you to enter an amount, do NOT enter a dollar sign OR commas. (just enter the number)
  1. YES: 21013
  2. NO: \$21,013
- USE your resources to complete the exam – Pub. 4012, Pub. 17, etc. Every question can be correctly answered with the materials you have access to
- Pub. 4012 contains flow-charts and checklists...these are EXTREMELY useful for the exam

**Taking the Advanced Certification Exam:**

1. Login to VITA Central
2. Select the *Advanced* tab
  - a. **\*Tax Professionals pursuing a Circular 230 Certification do NOT have to take this exam!**
3. Select the *Advanced Exam*



## **\*\*You have only TWO attempts to score at least an 80% on this exam\*\***

If you do not pass on your first attempt, we highly recommend reworking ALL of your printed out test questions prior to trying again.

You can also email [vita@branchesfl.org](mailto:vita@branchesfl.org), and someone will respond to you as soon as possible. Please keep in mind we cannot, and will not, provide you any exam answers. The certification process is how we help to protect the taxpayers who rely on our expertise. We will not tarnish that reputation.

### **[Circular 230 Federal Tax Law Update Test](#)**

**\*\*This Certification is only available to CPAs, Attorneys, and Enrolled Agents\*\***

**Do not complete your Circular 230 Certification prior to Thanksgiving. If you do, you will have to re-certify on this year's exam.**

By choosing this certification path, you are forgoing the ability to request Continuing Education (CE) credits for the time you spend volunteering. In exchange, you are able to complete your certification in significantly less time than it takes most "traditional" volunteers.

After completing your *VSOC* and *Intake/Interview & Quality Review* exams (Steps One, Two, and Three of this Training Manual), you can begin studying for your Circular 230 exam.

All potential Test and Retest questions are listed in Pub. 6744. Since the online exam chooses from both sets of questions randomly, we recommend you print out both, and complete each question on paper PRIOR to taking the online exam.

All questions can be answered based on the Preparation Materials available to VITA Volunteers. In particular, refer to Pub. 4491.

Taking the Circular 230 Federal Tax Law Update Test:

1. Login to VITA Central
2. Select the *Circular 230* tab
3. Select the *Circular 230 Test*

Once completed, you are eligible to prepare any return within the scope of VITA.

### **[Site Coordinators](#)**

Site Coordinators play a vital role in our VITA program. They are responsible for managing their site, scheduling and monitoring their volunteers, and completing various reporting obligations designed to protect our clients. Because of these additional responsibilities, they must complete an additional training module – the Site Coordinator Training.

\*As we explained earlier, Site Coordinators must also complete either an Advanced Tax Preparation

Certification, or a Circular 230 Certification. Please complete that training according to the method you chose – classroom or online.

To complete your Site Coordinator Training:

1. Login to VITA Central
2. Select the *Advanced Tab*
3. Click on *Site Coordinator Training*
  - a. As soon as you complete the training module, your Pass/Fail will update to reflect it was completed. There is no additional test required.

### [Continuing Education Credits](#)

The following Tax Professionals may be eligible to earn CE Credit for their VITA volunteering efforts: 1) Enrolled Agents; 2) CPAs; 3) Attorneys; 4) CFPs; and 5) non-credentialed tax return preparers.

Information on Continuing Education (CE) Credits for VITA Volunteers can be found here:

<https://www.irs.gov/individuals/link-learn-taxes>

\*(look for Continuing Education Credit towards the bottom of the page)

In order to qualify for CE Credits, you must:

1. complete the following with a score of 80% or higher:
  - Volunteer Standards of Conduct;
  - Intake/Interview & Quality Review Training; AND
  - Certify to the Advanced level in tax law
2. Volunteer at least 10 hours as a tax return preparer, Quality Reviewer, and/or tax law instructor
3. Provide your VITA site a signed Form 13615

CE Credits can be earned as follows:

1. 14 CE Credits – Volunteer at least 10 hours as a tax return preparer, Quality Reviewer, and/or tax law instructor
2. 4 CE Credits – available for certifying in any specialty course

Please contact [vita@Branchesfl.org](mailto:vita@Branchesfl.org) for more details on how to receive CE credits.

### [Volunteer Agreement](#)

CONGRATULATIONS!!!! You are officially an IRS Certified VITA Volunteer!

You have one more step to finish before you are able to serve at a VITA site:

1. Please login to *VITA Central*
2. You will see “You may sign your Volunteer Agreement electronically by signing this box”
3. Click the box

The screenshot shows the VITA Central website interface. At the top, there is a navigation bar with '2016 VITA/TCE Certification Test' and 'My Account'. Below this is a menu with tabs for 'Circular 230', 'Basic', 'Advanced', 'Military', 'International', and 'Puerto Rico'. The 'Advanced' tab is selected. Below the menu is a table with columns for 'Course name', 'Score', 'Pass/Fail (click for results)', and 'Attempts (2 attempts per exam allowed)'. The table contains two rows of data:

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)
<a href="#">2016 Volunteer Standards of Conduct - Exam</a>	100.00 %	Pass <a href="#">Print Certificate</a>	1
<a href="#">2016 Intake/Interview and Quality Review Exam</a>	100.00 %	Pass <a href="#">Print Certificate</a>	1

To the right of the table, there is a checkbox labeled 'You may sign your Volunteer Agreement electronically by checking this box'. The checkbox is checked. Below the checkbox, the name 'Joseph Muzaurieta' and the date '03/03/2017' are displayed. A red arrow points from the text 'Click the box' in the previous list to the checkbox.

4. Print your Volunteer Agreement
5. Provide the completed Volunteer Agreement to your Site Coordinator or email to [vita@branchesfl.org](mailto:vita@branchesfl.org)

Email us at [vita@branchesfl.org](mailto:vita@branchesfl.org) to let us know you are certified. We will go over the available preparation sites, and connect you with the site coordinator of the site you choose.