

## **Hello VITA Volunteers,**

Many of you will be doing self-study VITA training this year... BUT we will be here to help, and we have excellent resources available to you. Please make use of the Open Labs for help.

The primary training kit includes:

- 1 The 4012 Resource Guide
- 2 The 6744 Test/Retest Manual
- 3 White 3-ring binder to hold the 4012 Guide
- 4 2023 Changes. This is the first section of the very large Pub 4491 VITA Training Guide. The IRS is NOT printing the Pub 4491, but you can view/download it at <https://www.irs.gov/pub/irs-pdf/p4491.pdf>
- 5 Training Schedule
- 6 Sign-in sheet for Usernames and Passwords

These can be picked up at:

**Mesa United Way** 137 E University, Mesa, AZ 85201. Mondays - Wednesdays, 9 AM - 5 PM

OR

**Chandler City Hall** - 175 S Arizona Ave, Chandler, AZ 85225. East side of Arizona Ave just north of Chicago St. The kits will be in the visitor area located in the north-east corner of the lobby. It is open Mondays-Fridays from 8 AM to 5 PM (sharp). Self-service... but please sign the log when you pick up your kit!

OR

At **any scheduled training session.**

Email to [vita@mesaunitedway.org](mailto:vita@mesaunitedway.org) for ANY help or questions you may have. We will do our best to respond promptly.

## **GETTING STARTED**

1. Register on the Link and Learn Certification (VITA/TCE Central) website  
<https://www.linklearntaxescertification.com>

Create your account and write down your USERNAME AND PASSWORD on the VITA sign-in sheet. If you are a returning veteran VITA volunteer, then you can select "Forgot my password" and you will be sent an email. Then update your My Account Info when you log in.

- a. Group is "01 - VITA Volunteer"

- b. Site Coordinators (including assistants and anyone interested) please mark 'yes'. This will set you up to take the test. You can select no at first and then come back later and change this (and any other) selection.
  - c. Select 'yes' or 'no' for the remaining questions. Select 'yes' for "Do you plan..."
  - d. Training Source is "Other" or "Link and Learn"
  - e. Please use your real and proper name... not a nickname.
  - f. Leave SEID blank
  - g. Create a Username and Password (and write it down)
  - h. Enter your email address, home address and cell phone number.
  - i. Partner/Organization Name: Mesa United Way
  - j. Years you have volunteered including this year... **Please update this**. If this is your first year select "1".
  - k. **Professional Status should only be selected** if you have a PTIN and/or are a professional wanting to receive **Continuing Education Credits**. In this case, PLEASE enter your PTIN # and your name exactly as it appears on your PTIN card. Leave the CTEC (California Tax Education Council) number blank.
2. Create your account on TaxSlayer Practice Lab website (**Skip this step if you are a Greeter**) <https://vita.taxslayerpro.com/IRSTraining>

The initial password is **TRAINPROWEB** (all in caps) this will bring you to where to create your account or sign into your existing account. If you are creating an account Program Type = VITA and the **SIDN is not needed... leave it blank**. If you are a returning veteran then you can use your Username and Password from last year. Please write down your username and password on the VITA Sign-in Sheet.

## **LEARN AND TEST**

1. For all tests, PLEASE complete each **TEST IN THE BOOK** (6744) before you do it online! Each question for the on-line test will be the test question from the book. If you take a test and do not pass...**then STOP and contact someone** (Mesa United Way) for help before attempting it again on-line. We will go over your answers before you try again.
2. All volunteers MUST complete the first two VITA tests. Even if you are coming to a Classroom Training cycle... **Please complete the next two steps** before coming to class.
3. **Standards of Conduct Test**. Go to <https://www.linklearntaxescertification.com> This is a very simple exam that does not involve any tax law... only ethics and good judgement. The training for this exam can be found on the right side of the screen. *"If you would like to review the Volunteer Standards of Conduct course, click here to review the course in PDF format."* Just click on the name of the course and select "Launch" in the pop-up.

After you pass the test you can click on “View My Certificate” and print a copy for your use. Do not send this to us. This is just for your use.

- 4. Interview and Intake Test.** Follow the same process as for the Standards of Conduct. This will be a little more involved but still doesn’t include any tax law. It’s about the processes that the taxpayer and screener will follow.
- 5.** If you are a **Greeter** then you are **finished with your testing!**

### **Printing your VITA Volunteer Agreement**

In the top right corner of the main website page find “*You may sign your Volunteer Agreement electronically by checking this box*”. Please Check that box

Directly under that text you will find “[Click here](#) to open and complete your Volunteer Agreement. Click Print from the file menu to print the page.” Please do this, save the pdf file (which will be your IRS Form 13615 Volunteer Agreement), send a copy to [vita@mesaunitedway.org](mailto:vita@mesaunitedway.org) and print a copy for you to keep (and bring to your service site).

- 6. Tax Law Training** - Go to <https://apps.irs.gov/app/vita/sitemap.jsp> This is the site where you will find the IRS training for tax law. It will be updated soon. Choose your path for learning and certification - Basic or Advanced.
- 7. Basic Test** – We recommend that all (especially new volunteers) take and pass the Basic Test first and then move on to the Advanced. Some of it may seem repetitive but it will give you more practice in preparing returns. Note that the test returns will be much more difficult than any that you will see at your site.
- 8. First 6 Scenarios** – The first 6 problems in each of the tests (Basic and Advanced) will be “word problems”. No returns to be prepared. They test your tax law knowledge. And yes, they can be a bit tricky. Use your 4012 Resource Guide to find the answers (and the Tax Law Training... see 6. above).
- 9. Tax Return Scenarios** – The last three problems (7-9) require that you prepare a tax return to answer each set of questions. These test tax returns will include essentially everything (and more) than you will encounter when you are in production at a VITA site.
- 10. The Practice Lab** - Go to <https://vita.taxslayerpro.com/IRSTraining/> Prepare each return in the Practice Lab and then go back to the Test Booklet (Pub 6744) to answer the questions. Note that the social security numbers all have “00” in the center for testing scenarios. Use any four digits for the last four digits of the social security number. Example 301-00-1234.

Again, we strongly recommend that you attempt the Basic test first and then proceed to the Advanced. Those wanting CEC credits must pass the Advanced test. And remember, if you take a test and do not pass...then STOP, record which questions that you missed, and contact someone (Mesa United Way) for help. Our Open Labs are there for this purpose.

See **Printing your VITA Volunteer Agreement** above.

### **TAXSLAYER VIDEOS**

You can learn how to use the TaxSlayer software on the initial webpage, please see "Recorded Webinar 3: Return Preparation 1" in Section 6 ... this is a video on how to use TaxSlayer for new users. It will be updated soon for 2023, but there have been relatively minor changes so it should be useful now.

### **VIDEO ON-LINE TRAINING RESOURCES**

We will be announcing multiple options for the on-line virtual training option. PLEASE READ YOUR EMAIL!

Thank you again for volunteering! And remember.... if you have problems with the test questions you can email us for help! [vita@mesaunitedway.org](mailto:vita@mesaunitedway.org)

The Mesa United Way VITA Team