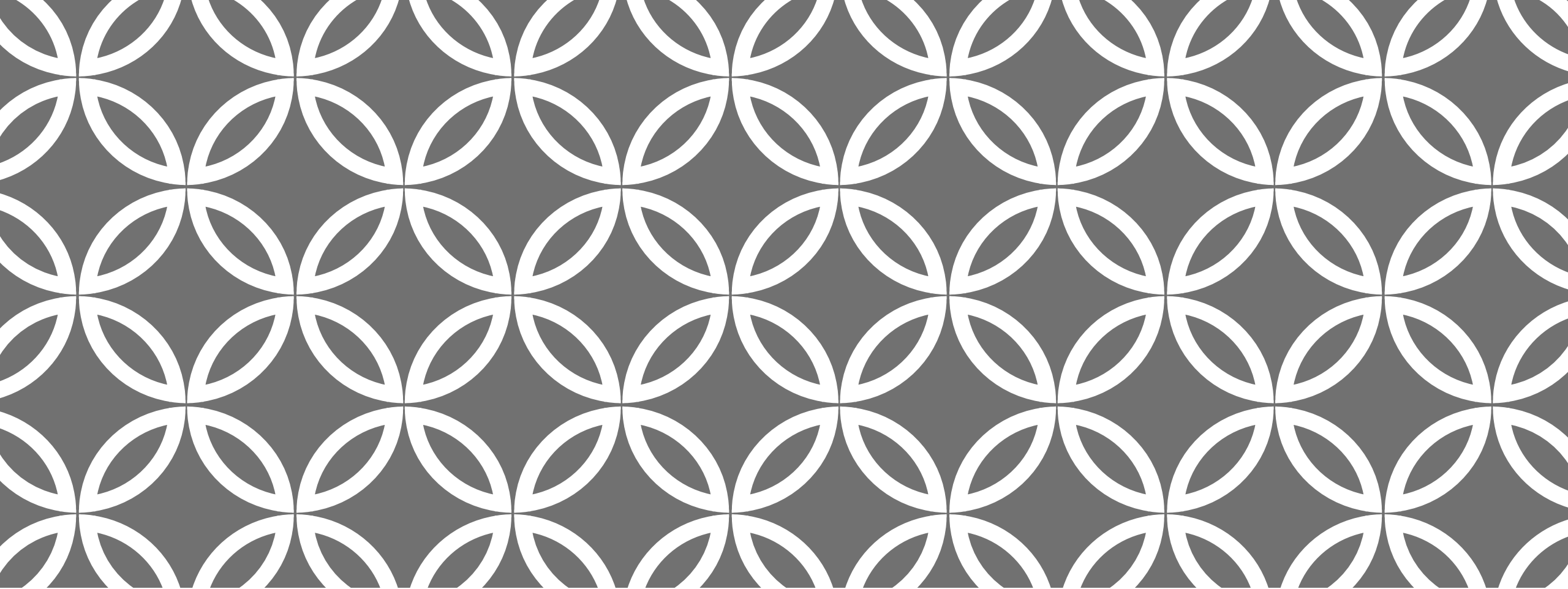


CERTIFICATION EXAM TIPS

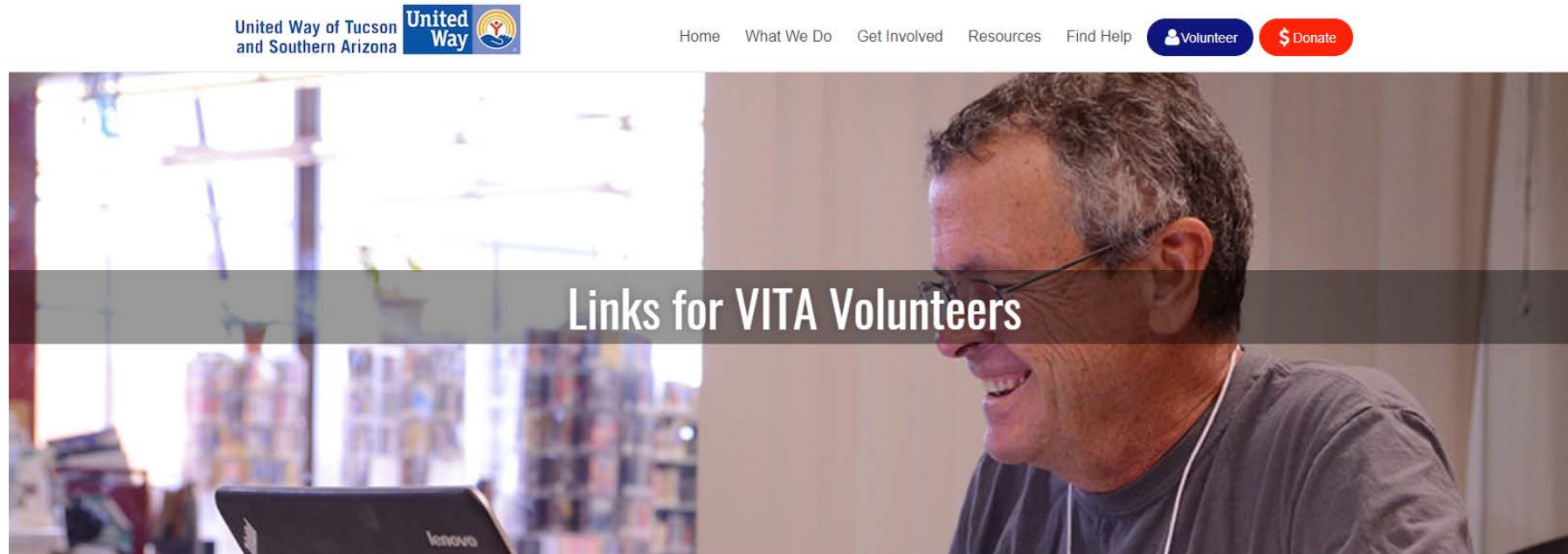
Refer to this for tips and tricks to get over common road bumps!



[UNITEDWAYTUCSON.ORG/VITALINKS](https://www.unitedwaytucson.org/vitalinks)

This page on our website is a great reference when out in the field, preparing to take exams, and more!

LOOKS LIKE THIS



Thank you for being a VITA volunteer! Whether you're preparing for your first year, or a VITA veteran looking to find the taxable portion of a client's annuity payments, we have the resources you'll need. If you look through these resources and still have questions, reach out to [Rachel Cheeseman](#).

For VITA Volunteers in the Field

[VITA Taxpayer Survey TY'18](#)

[BRAND NEW: IRS Publication 5307](#) – an explanation of the latest round of tax reform legislation and its impacts on individuals and families.

[Dependent Qualification Calculator](#) – helps determine whether an individual can be claimed as a dependent, as well as the credits for which they may qualify.

[Education Credit Calculator](#) – helps determine whether an individual is eligible for an Education Credit, and which credit would be most beneficial.

FOR EXAM TIPS...

For Self-Guided Training Online

[IRS Publication 4012](#) – the primary on-site consultation guide for VITA volunteers; includes interview tips, decision trees, instructions for data entry in TaxSlayer and more.

[IRS Publication 6744](#) - For those planning to certify as VITA volunteers at any level, the exam questions and scenarios are found in this booklet. A hard copy can be picked up at the United Way office. Call 520.903.9000 and let the operator know when you'd like to pick one up.

[TaxSlayer Practice Lab](#) – useful for practice in preparing sample returns and inputting data from various tax forms; use **TRAINPROWEB** password for landing page, then create or log in to your individual account. For assistance, contact [Rachel Cheeseman](#).

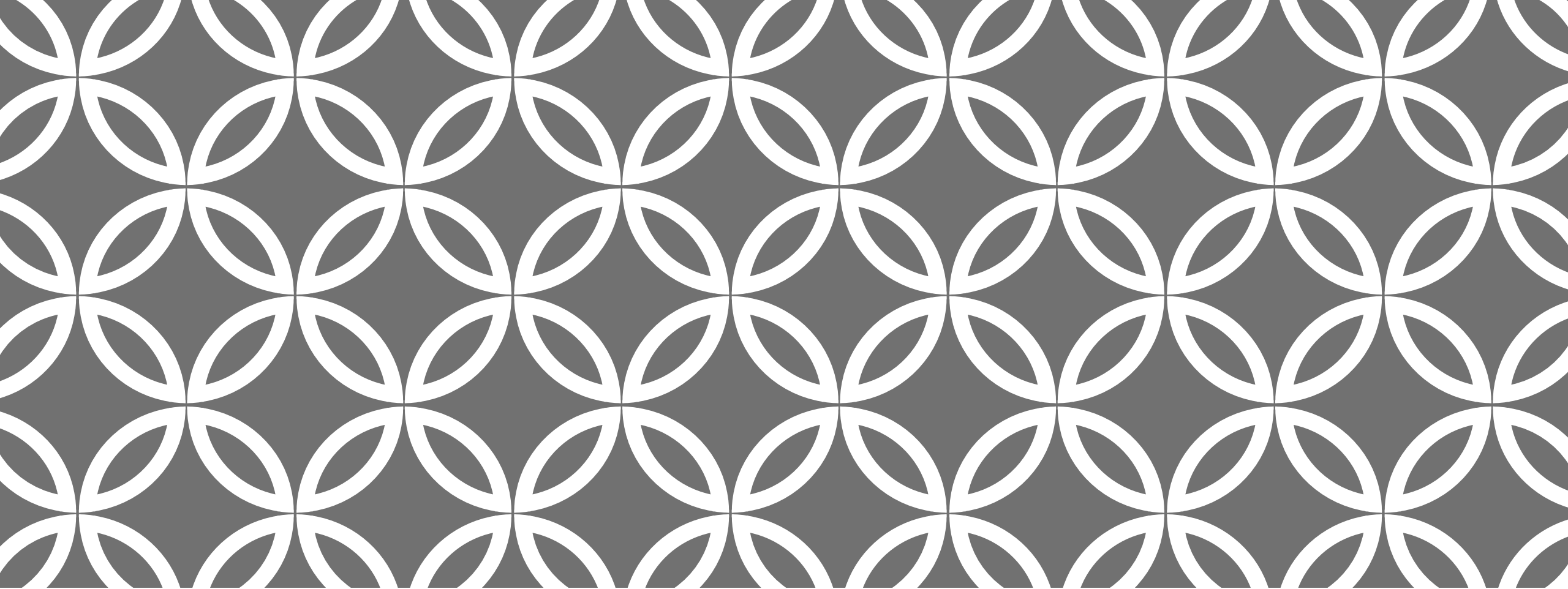
[Link & Learn Online Training](#) – IRS-provided learning modules covering various topics related to tax law and return preparation

[Online Training from United Way of King County](#) – interactive online training modules for certification test prep. (**Note:** These modules don't always work in Google Chrome. Use Firefox or Internet Explorer as your browser.)

[IRS Publication 4491](#) – IRS-provided textbook for learning tax law and the basics of return preparation

[IRS Publication 4491-W](#) – IRS-provided workbook with full intake sheets, documents and interview notes of fictional taxpayer situations; returns may be prepared with this content in the TaxSlayer practice lab, but results will not necessarily match the answer key due to changes in the tax code year to year

You'll find links to online versions of the 4012, the 6744, the TaxSlayer Practice Lab, and the online portal to submit answers to your exams 😊



LINKLEARNCERTIFICATION.COM

Create your account or log back in, and submit your exam answers!

LOOKS LIKE THIS...

The screenshot displays the VITA/TCE Central website interface. At the top, the title "VITA/TCE Central" is prominently displayed in blue and grey text, accompanied by a yellow star icon on the left and the IRS logo on the right. Below the title bar, a navigation menu includes a "Home" link. The main content area is organized into three columns:

- Certification Tests:** This section features a row of five icons representing different test categories. Below the icons are input fields for "Login Name:" and "Password:", each with a text box and a password mask icon. Three links are provided: "Login to your IRS account:" with a blue "Login" button, "Set up a new IRS account:" with a blue "Create Account" button, and "Forgot Password or Login Name?" with a blue "CLICK HERE" link. A final link, "Need Password assistance? Contact us by clicking here.", is located at the bottom of the section.
- Instructor Tools:** This section lists three resources: "Classroom Presentations" (with a presentation icon), "Lesson Plans" (with a document icon), and "Instructor Guide 4555e" (with a document icon).
- More Help:** This section contains three links: "Getting Started Tutorial", "IRS Publications and Forms", and "Get Adobe® Reader®", each preceded by a blue circular icon.
- Quick Links:** This section lists eight resources: "Link & Learn Taxes Lessons", "Certification Test/Retest PDFs", "VITA/TCE Training Guide PDFs", "Evaluations", "Practice Lab", "VSOC Training", "Fact Sheet: Continuing Education Credits", and "Intake/Interview and Quality Review Training". Each link is accompanied by a small icon representing the resource type.

CREATING AN ACCOUNT

Fill out the information to the best of your ability.

Many fields are not required!

You only need to enter a PTIN if you have one and would like to receive continuing education credit.

Select “Other” for how you’re training this year.

LOGGING BACK IN

We use this account about once a year. There's no shame in resetting a password.

Consider choosing something simple and VITA-specific!

Remember: You do *not* need to pass the Basic tax prep exam to take the Advanced tax prep exam!

YOUR VOLUNTEER AGREEMENT

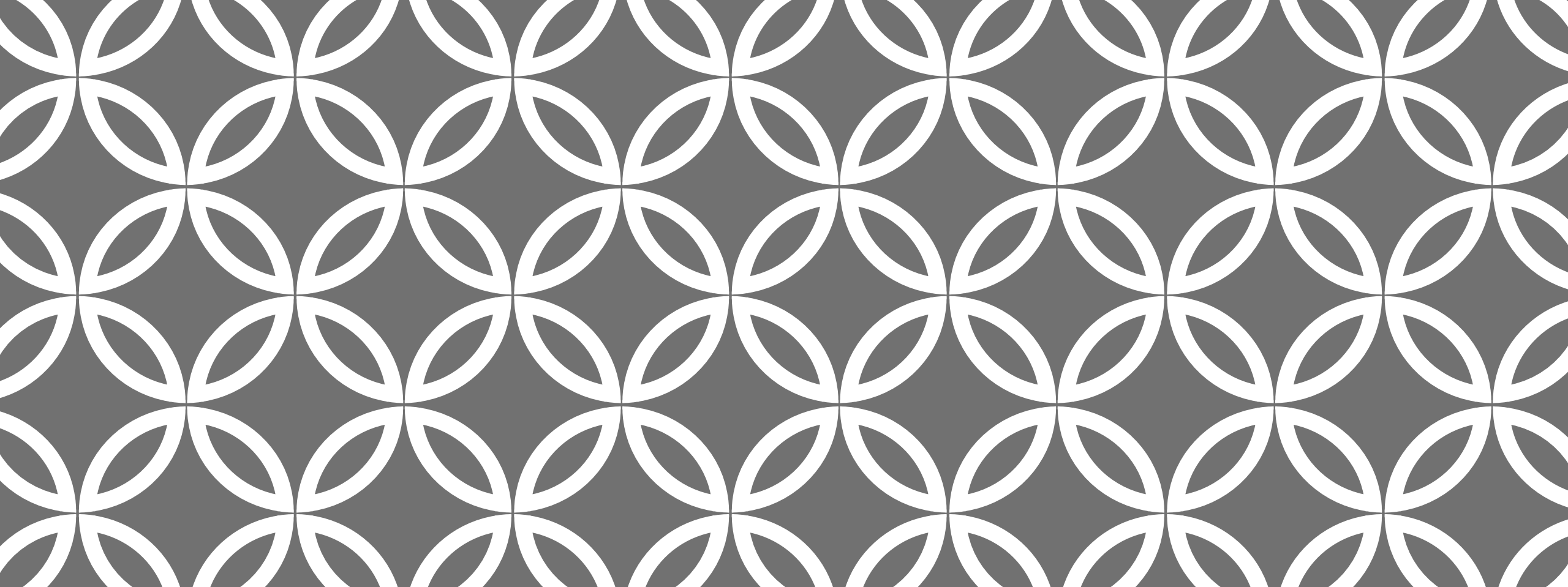
We need to have every volunteer's agreement on file.

You can e-sign your volunteer agreement using the checkbox on the right of the certification portal.

Click the download link, save the file, and email it to the volunteer coordinator.

Please also bring a hard copy to your first VITA shift!

Military	International	Puerto Rico
Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	<input checked="" type="checkbox"/> You may sign your Volunteer Agreement electronically by checking this box
Pass Print Certificate	1	Rachel Cheeseman 01/14/2020
Pass Print Certificate	1	Click here to open and complete your Volunteer Agreement. Click Print from the file menu to print the page.
Pass Print Certificate	1	Save the Volunteer Agreement for your records.
	N/A	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.



VITA.TAXSLAYERPRO.COM

Logging in to the TaxSlayer
Practice Lab.

LOOKS LIKE THIS...

VITA/TCE Springboard Home Email Support

Practice Lab
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.

Pro Online
In order to get started with creating, viewing, modifying, or transmitting returns for the IRS, your site has been created and you have your credentials ready.
Please click here to visit your site.

VITA/TCE Blog
The VITA/TCE Blog will keep you up to date with any changes and notifications regarding IRS Preparers and Standard Chartered's VITA/TCE returns for the IRS.
Click here to view the latest updates.

Support Guides
Please use the guides below to help yourself get acquainted with the various applications.
[Download the Pro Online User Guide](#)
[Download the Pro Desktop User Guide](#)

The image shows a screenshot of the VITA/TCE Springboard website. A red circle highlights the 'Practice Lab' section. Three red 'no' symbols are overlaid on the 'Pro Online', 'VITA/TCE Blog', and 'My Account' sections. A photograph of a person using a laptop is visible in the bottom left corner of the page.

TAX SLAYER PRACTICE LAB

The practice lab is where you can prepare fictional returns for fun and practice, and where you can prepare scenarios from the tax preparation exams.

Use the far left button **ONLY** for practice returns.

When you click the Practice Lab button, enter the password TRAINPROWEB on in the field as pictured to the right.

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

LOGGING IN

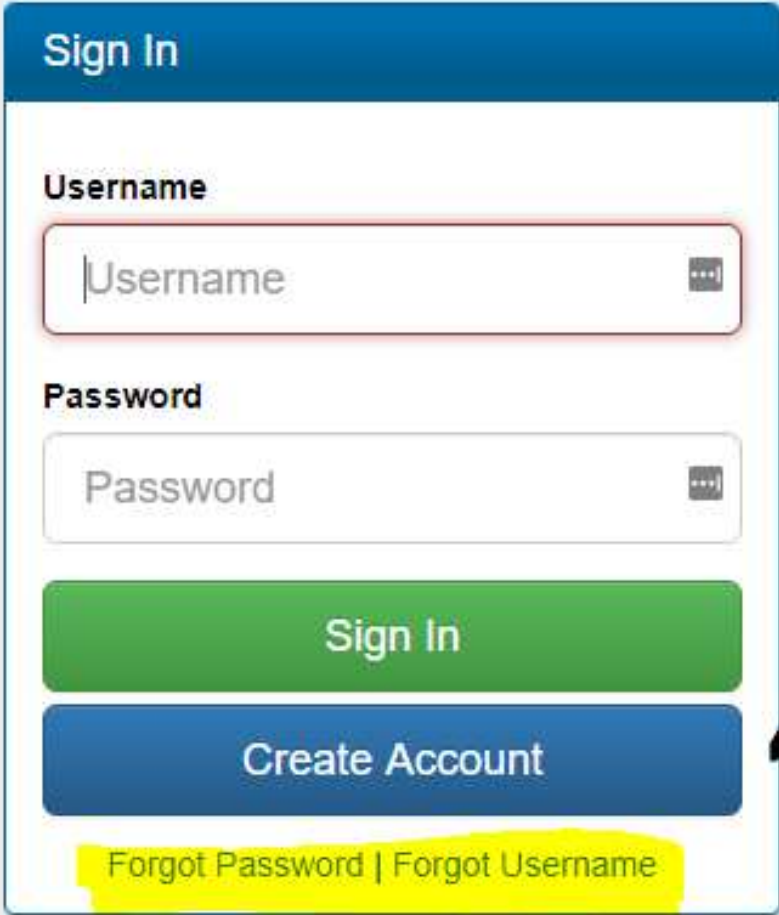
If this is your first year, create an account!

If you're returning, remember...

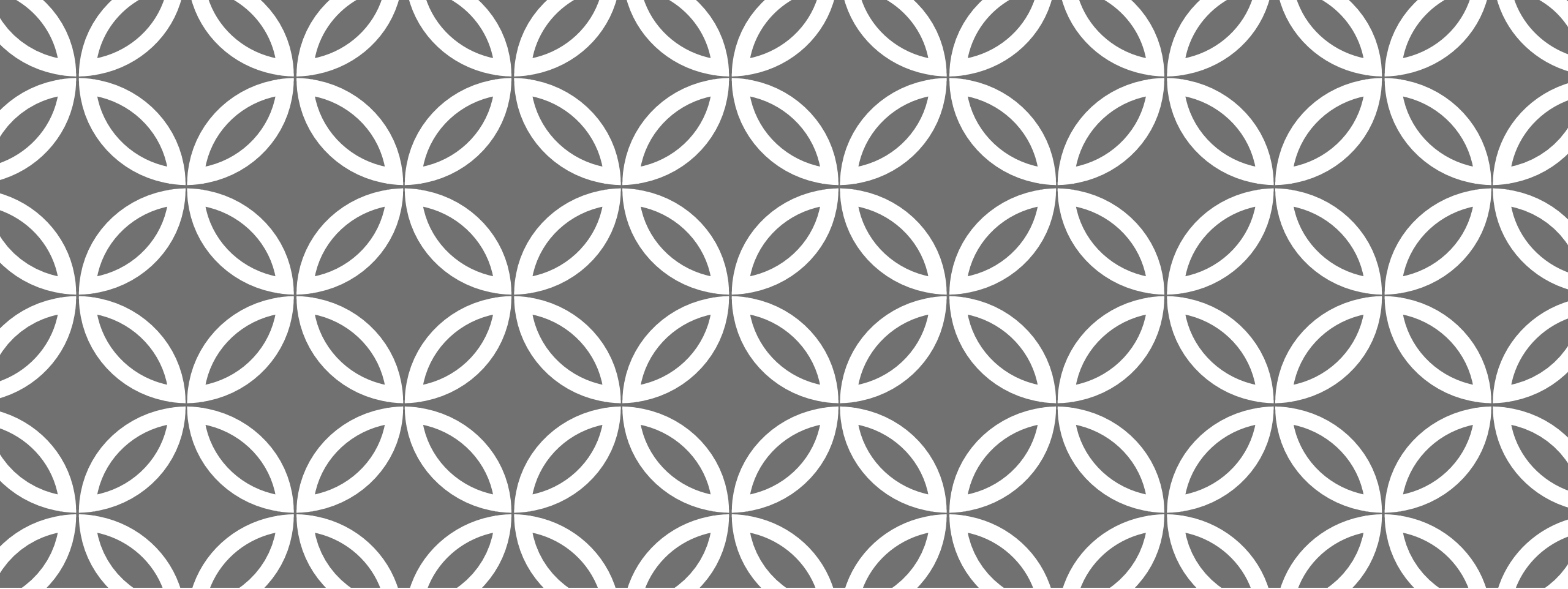
Your username and password will probably be different from what you used at sites last year.

There's no shame in resetting your password or requesting your username.

If you need help, contact the volunteer coordinator and ask them to walk you through it!



The image shows a digital form titled "Sign In". At the top is a blue header with the text "Sign In". Below the header are two input fields: "Username" and "Password". Each field has a placeholder text of the same name and a small icon on the right side. Below the input fields are two buttons: a green button labeled "Sign In" and a blue button labeled "Create Account". At the bottom of the form, there is a yellow highlighted area containing the text "Forgot Password | Forgot Username". A hand-drawn black arrow on the right side of the form points towards the "Create Account" button.



THE END

We hope this answered some of
your questions!