CERTIFICATION EXAM TIPS

Refer to this for tips and tricks to get over common road bumps!
This page on our website is a great reference when out in the field, preparing to take exams, and more!
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 😊
LOOKS LIKE THIS…
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!
Logging in to the TaxSlayer Practice Lab.
LOOKS LIKE THIS...
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.
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!
We hope this answered some of your questions!