United We Thrive

VITA New Volunteer Tech Training

United Way of Greater Cincinnati

December 1, 2024



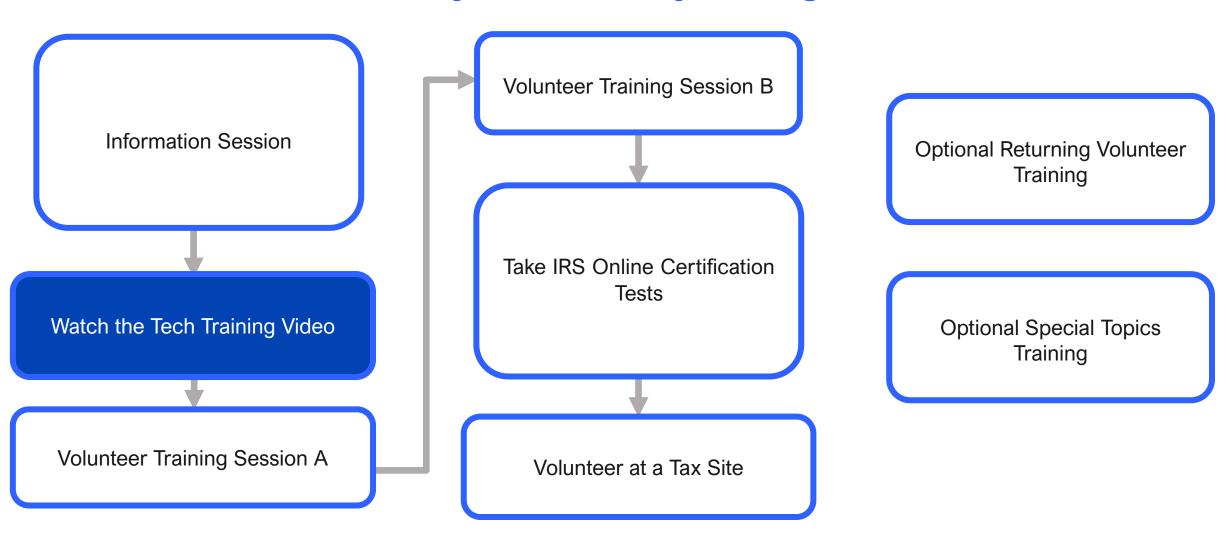


Today's Agenda

- Welcome to all new VITA volunteers!
- Resources
- Mobilize
- What happens at a tax site?
- VITA/TCE Central: account setup
- Testing: which tests, how, and when?
- TaxSlayer Practice Lab: create an account and access the Practice Lab
- Additional Resources for your continuing journey

Your Volunteer Pathway: From today through Tax Season







Resources for this session:

- IRS Pub 6744 Volunteer Assistor's Test/Retest
- IRS Pub 4961_Volunteer Standards of Conduct Ethics Training
- IRS Pub 5838 Volunteer Intake/interview and Quality Review Handbook
- <u>Link and Learn</u> Taxes e-Learning
- <u>TaxSlayer Practice Lab</u>
- <u>UWGC Free Tax Prep Password Sheet</u>
- VITA/TCE Central Certification Site



Volunteer Platform Sign-Up

- If you haven't already, visit United Way's Free Tax Prep volunteer page to confirm your contact information.
- Join our Mobilize group for the most up to date information and resources for the 2025 tax season.



What Happens at a Tax Site?

- Greeting (Dedicated Greeter)
- Intake Paperwork/Screening (Taxpayer)
- Interview (Screener/Preparer)
- Tax Preparation (Certified Preparer)
- Quality Review (Certified Reviewer)
- Print
- E-filing (Site Coordinator)

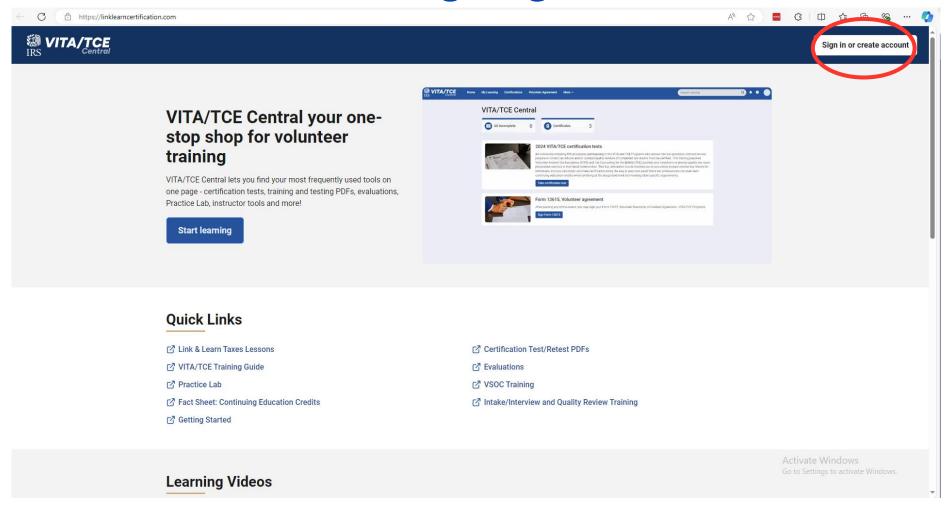


VITA/TCE Central: Certify with the IRS

- VITA/TCE Central is the IRS platform for certifying VITA volunteers.
- Access <u>VITA/TCE Central</u> (linklearncertification.com)to set up your account.



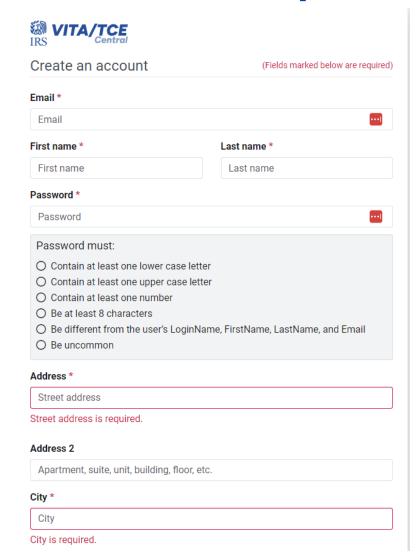
VITA/TCE Central Landing Page

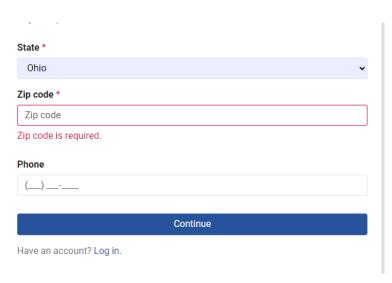




VITA/TCE Central: Account Set Up

- Notes:
- Your name should match your driver's license.
- Use your <u>password sheet</u> to record the password you just created!







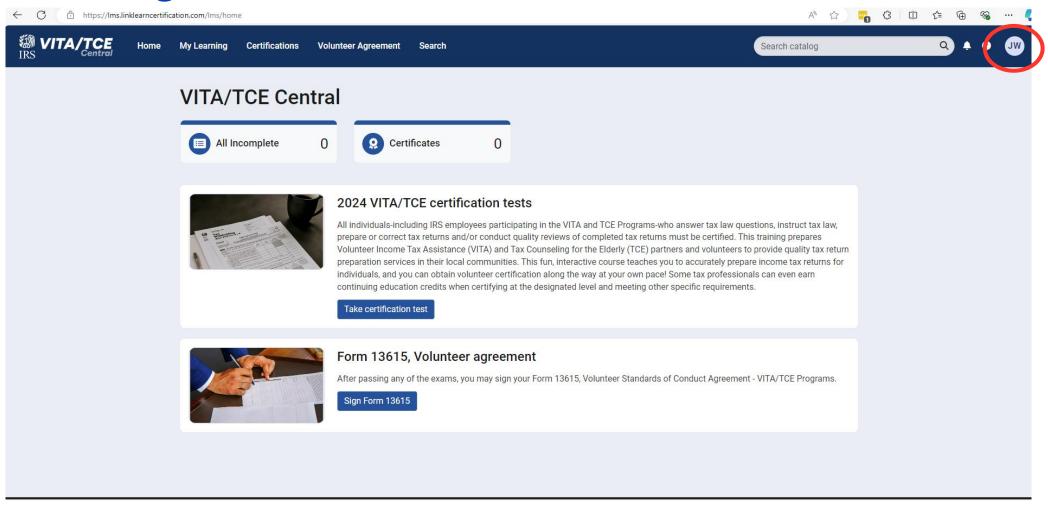
VITA/TCE Central: Account Set Up

Cancel	Save
Account Account	
Account Information	Volunteer Position(s)
Profile Image	Please select your volunteer position(s).
Contact Information	☑ VITA Volunteer
User Profile Details	☐ TCE - AARP Volunteer
Volunteer Position(s)	☐ TCE - Other Volunteer
Form 13615 Details Continuing Education	□ VITA - Military Volunteer
Continuing Education	☐ IRS Employee - SPEC
	☐ IRS Employee - Other
	☐ IRS Employee - Volunteer
	☐ Federal Employee non-IRS employee
	☐ Foreign Student Site Volunteer
	☐ Site Coordinator
	Other
	☐ I do not plan to volunteer in the VITA/TCE Program

Activate Windows
Go to Settings to activate Windows.

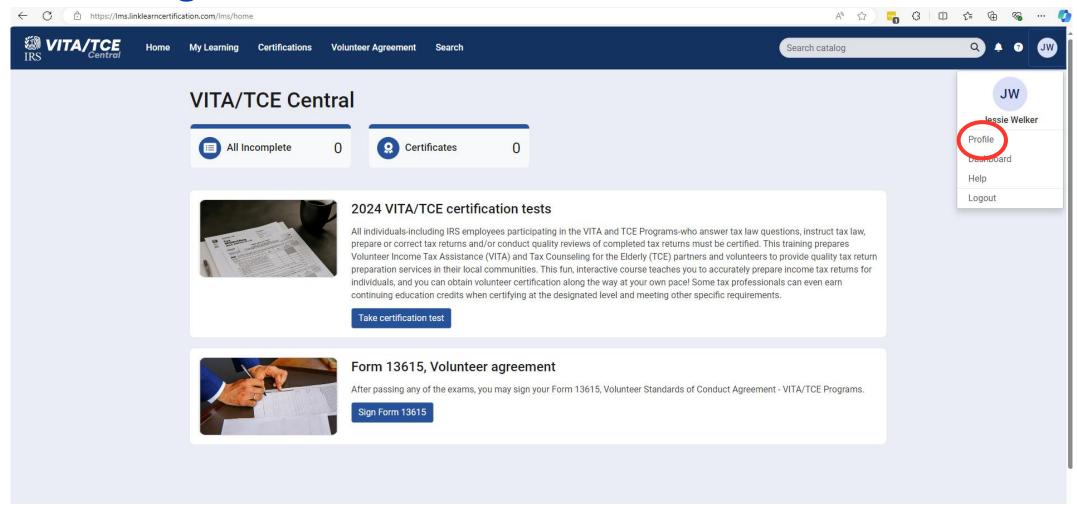


Continuing Education Credits



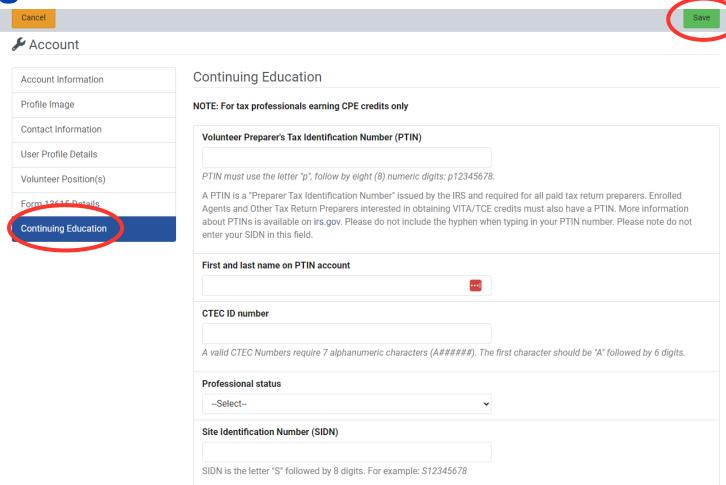


Continuing Education Credits





Continuing Education Credits



VITA Test Booklet

- IRS Testing
- Take your tests on <u>VITA/TCE Central</u>, but access <u>IRS Pub 6744</u> to find the questions, scenarios, and associated documents.





VITA/TCE Volunteer Assistor's Test/Retest

Volunteer Income Tax Assistance (VITA) / Tax Counseling for the Elderly (TCE)

2024 RETURNS





Take your VITA/TCE training online at https://apps.irs. gov/app/vita/. Link to the Practice Lab to gain experience using tax software and take the certification test online, with immediate scoring and feedback.



Form 6744 (Rev. 10-2024) Catalog Number 43560V Department of the Treasury Internal Revenue Service www.irs.gov



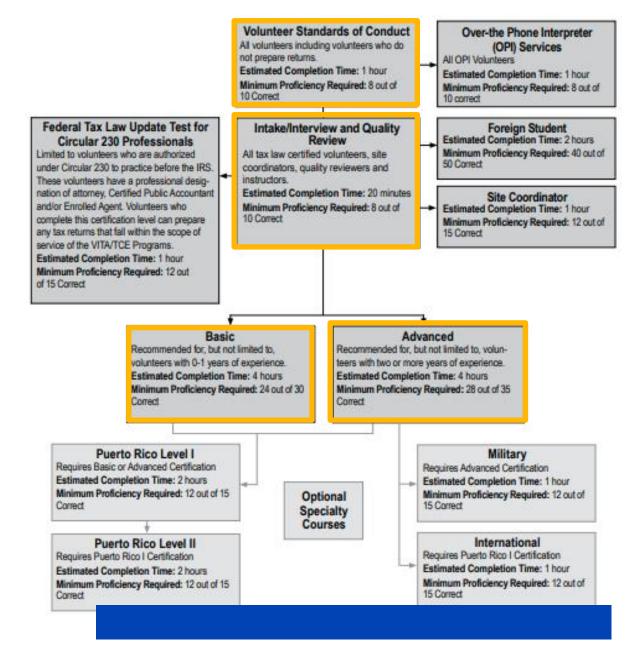
IRS Pub 6744 VITA Test Booklet

- 217 pages, but **don't panic** we don't take all the tests!
- Test page numbers:
 - Volunteer Standards of Conduct p. 14
 - Intake/Interview and QR p. 21
 - Basic Preparer p. 31
 - Adv Preparer p. 75
- IRS Pub 6744 VITA/TCE Volunteer Assistor's <u>Test/Retest</u>

Certification tests

- Step 1: All volunteers take the Volunteer Standards of Conduct Test.
- Step 2: All volunteers take the Intake/Interview and Quality Review Test.
- **Step 3:** All preparers/reviewers take at least the basic test, but preferably the advanced!

Note: 80% is considered a passing grade and everyone can re-test once per test.





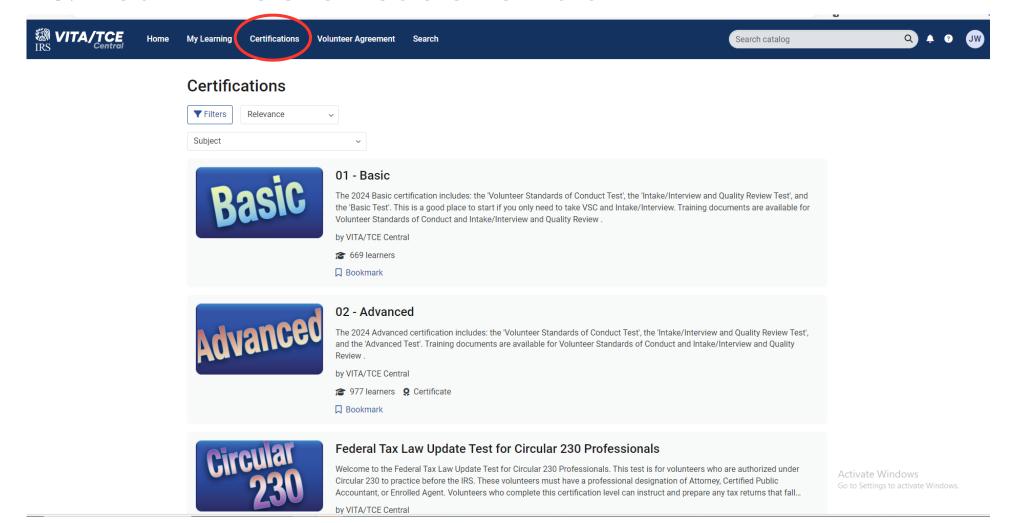


Your First Exam: Volunteer Standards of Conduct

- Read/review the Volunteer Standards of Conduct (VSOC) for VITA volunteers in IRS Pub 4961 (p. 1-19).
- If you would like to view the questions before testing, preview them in IRS Pub 6744, p. 14.



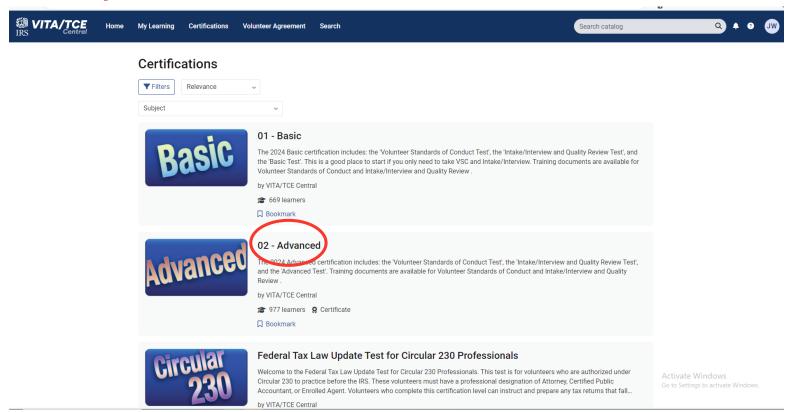
Link & Learn – Certifications Tab



Take your VSOC Test



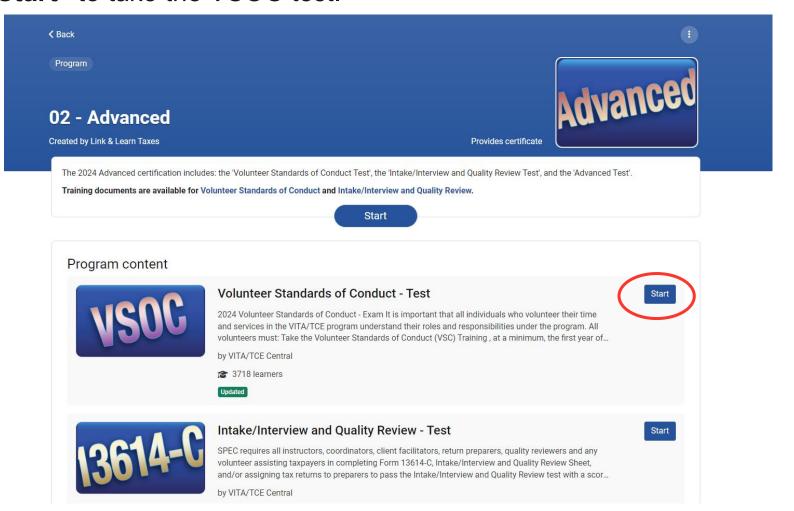
- Sign into your <u>VITA/TCE Central</u> account.
- Go to the Certifications tab.
- Select 02 Advanced Exam.
- The VSOC test is only available after selecting a tax law exam. It will not show up on the certifications screen.





Take your VSOC Test

Select "Start" to take the VSOC test.





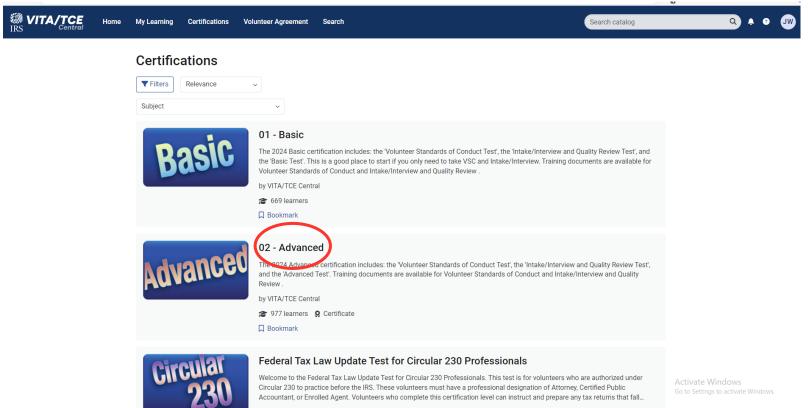
Your Second Exam: Intake/Interview & Quality Review

- Read/review pages 3-15 of IRS Pub 5838 Intake/Interview and Quality Review Handbook.
- If you would like to view the questions before testing, preview them in IRS Pub 6744, p. 21.

Take the Intake/Interview & Quality Review Test



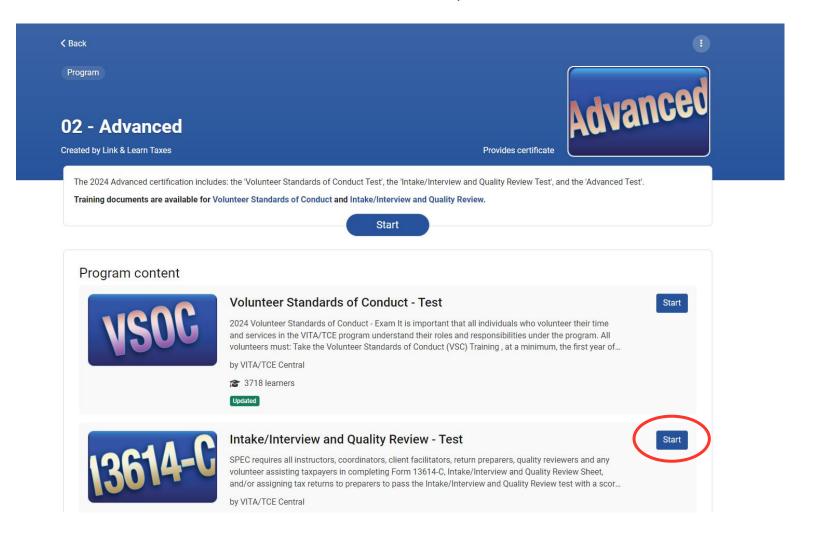
- Sign into your <u>VITA/TCE Central</u> account.
- Go to the Certifications tab.
- Select 02 Advanced Exam.
- The Intake/Interview & QR test is only available after selecting a tax law exam. It will not show up on the certifications screen.





Take your Intake/Interview & Quality Review Test

Select "Start" to take the Intake/Interview & QR test.





Congrats! First Steps Successful!

- You took and passed the VSOC and Intake/Interview tests! Now you
 are ready to participate in tax preparer training <u>Part A</u> and <u>Part B</u>. Sign
 up using the above links if you have not already done so.
- Even if you are convinced you only want to help in the greeting and intake process, preparer training makes you much better at both!
- To prepare returns, you will need to take at least the Basic exam, but we encourage all preparers to take the Advanced exam.



Practice Tax Returns

- Both exams will require you to create practice tax returns.
- We use an IRS provided software called TaxSlayer Pro it adequately handles all types of VITA returns.
- TaxSlayer provides a special "practice area" for you to create your practice returns.
- Let's get started!



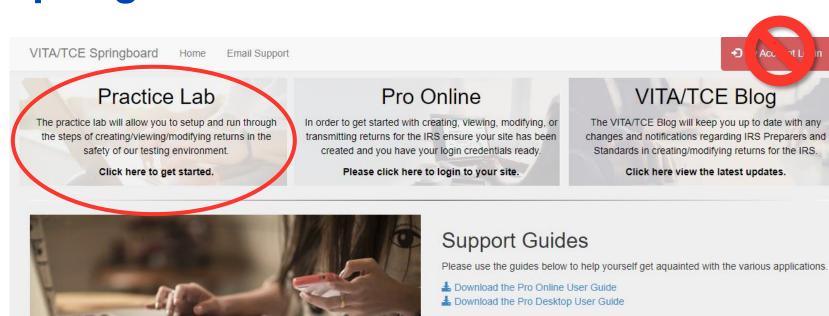
TaxSlayer Software

- <u>TaxSlayer Pro for VITA</u> (vita.taxslayerpro.com)
- Select Practice Lab.
- Enter universal password: TRAINPROWEB (all CAPS)
- Create your personal account:
 - Remember to record username and password on your password sheet!
 - The Password has a 15-digit requirement.
- Select Go to Practice Area.
- Select Start New 2024 Tax Return.
- Select Start Return.



TaxSlayer VITA Springboard

https://vita.taxslayerpro.com/



VITA/TCE Knowledgebase

Search Knowledgebase

Enter Search Term

Find Matches

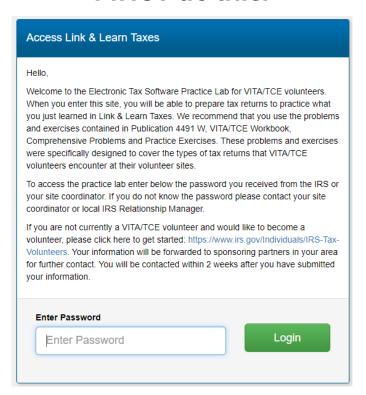
Click here to search the entire VITA/TCE Knowledgebase.



TaxSlayer VITA Springboard

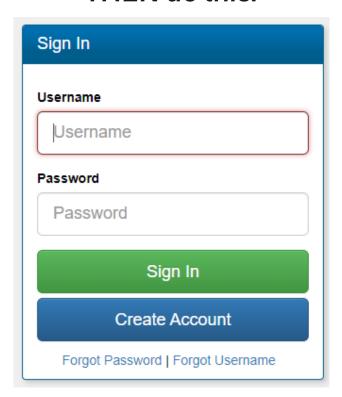
https://vita.taxslayerpro.com/

FIRST do this:



Enter "TRAINPROWEB"

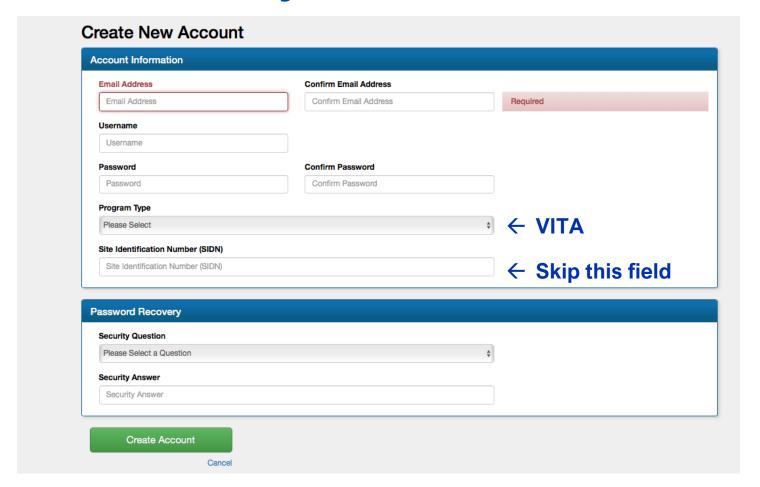
THEN do this:



Click "Create Account"



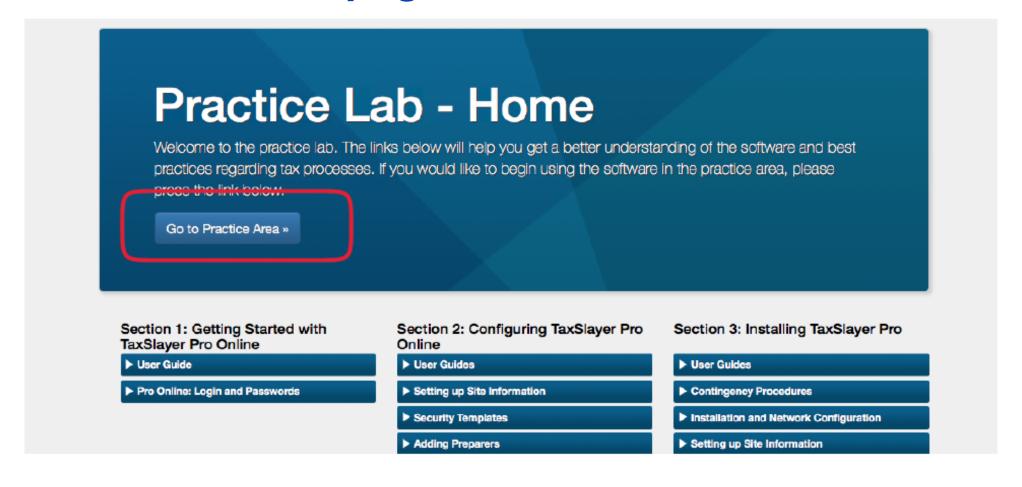
Create TaxSlayer Account



Important: Now use your password sheet to record the User ID and password you just created!



Practice Lab: home page





Additional Guides and Resources

- IRS Pub 4012 VITA/TCE Volunteer Resource Guide the book we use to do everything!
- <u>IRS Pub 4491 VITA/TCE Training Guide</u> great resource when certifying.
- VITA-Train by Prosperity Now additional in-depth training and practice



IRS Guides and Resources – Hardcopy Pickup

- We order enough hard copies of IRS training materials for all volunteers to have their own copy.
- The materials are currently available for pick up at:
 - United Way of Greater Cincinnati (2400 Reading Rd., Cincinnati, OH 45202), Monday-Friday
 8:30am-12:00pm and 1:00pm-4:30pm.
 - Center for Great Neighborhoods (321 W MLK Blvd., Covington, KY 41011), Monday-Thursday
 9:00am-5:00pm, and Friday 9:00am-12:00pm.
 - Care Center (11020 S. Lebanon Rd., Loveland, OH 45140), Tuesday, Thursday, and Friday
 10:00am-6:00pm.
 - OhioMeansJobs-Butler County (4631 Dixie Highway, Fairfield, OH 45014) Monday-Friday 8:00am-4:00pm.
- IRS Pub 4012 and IRS Pub 6744 are also available online.



Volunteer Liability Protection

Volunteer Protection:

The Volunteer Protection Act generally protects unpaid volunteers from liability for acts or omissions that occur while acting within the scope of their responsibilities at the time of the act or omission.

It provides no protection from harm caused by willful or criminal misconduct, gross negligence, reckless misconduct, or a conscious, blatant disregard of the rights or safety of the individual harmed by the volunteer.



Need help? We are here!

- Send a request for assistance or question(s) to:
 - <u>freetax@uwgc.org</u>
 - Include your name, e-mail, and phone, and nature of your question.
- A trainer will contact you.
- Our team of trainers is here to help you. None of us knows every aspect of tax law! We will ensure you are supported when you come to volunteer at a site. You've got this!



Thank you and see you again!

We encourage everyone to attend the additional sessions of tax law training regardless of the role you plan to pursue. You will find that the scope of our tax work is mostly straightforward. Plus, the more you know about VITA and tax law, the more you will be able to help the families who seek our services. You will be a tax guru in (k)no(w) time!