

# Getting started as an IRS certified VITA/TCE Volunteer Preparer for NYC Free Tax Prep

## Step 1: Self-Guided Learning

The self-guided online training program teaches you everything you need to know to complete accurate tax returns.

To access the training program, start at the [Link & Learn Taxes e-Learning webpage](#) and select the Certification Paths tab.

Then, use the drop-down menus to select your preferred path (Basic or Advanced).

The Basic path will prepare you for the Basic IRS Certification exam. At this level, you will be able to complete most simple returns.

The Advanced path will prepare you for the Advanced IRS

Certification exam. At this level, you will be able to complete all returns within the scope of the IRS VITA/TCE program.

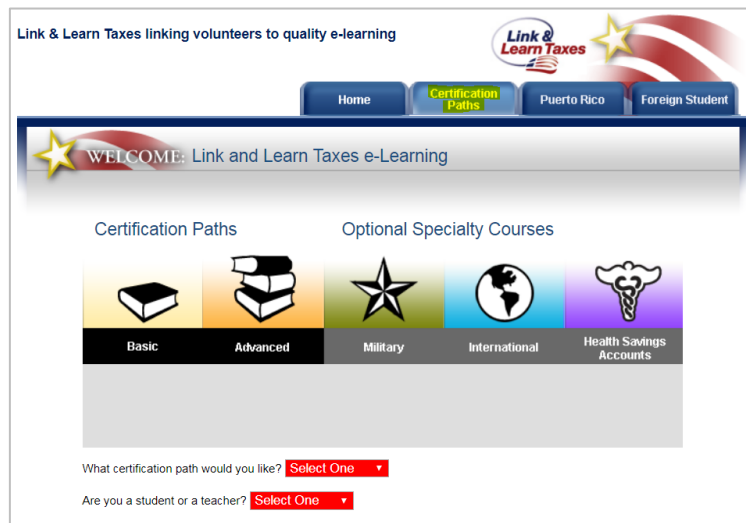
You do not have to complete the Basic exam before completing the Advanced exam.

The training menu will open. **Use the numbered lessons to review each topic.**

- Each topic includes the lesson, which will open in a separate window. The lesson will:
  - Introduce the relevant tax law
  - Provide “warm up” questions to check your understanding
  - Show you examples of the materials that will be on site while you file taxes to help you prepare returns accurately

Practice what you have learned using the VITA/TCE Problems and Exercise Workbook ([PDF](#)) and the [Practice Lab](#). Both are also linked from the final page of each lesson.

- NOTE: Please use the generic password “TRAINPROWEB” to gain access to the TaxSlayer Practice lab. You will be prompted to create an account when you first try to log onto the TaxSlayer Practice Lab.



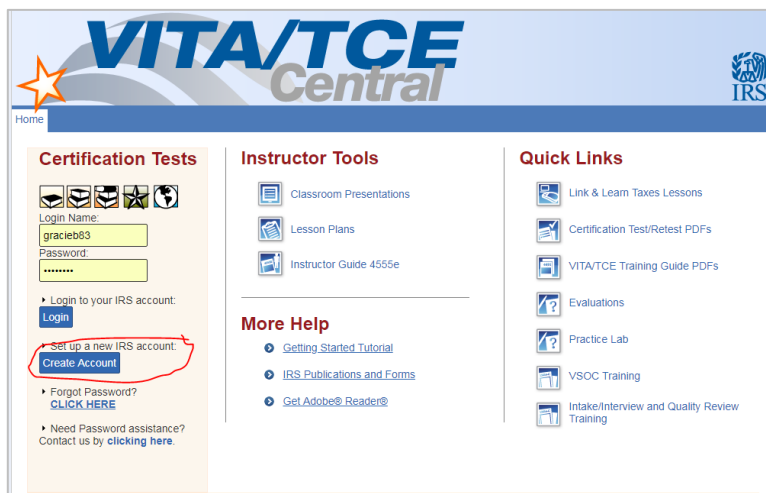
## Step 2: Test

Next, complete the required exams to receive your certification.

From [VITA/TCE Central](#), create an account.

Some notes on the [self-registration form](#):

- In most cases, you will select group 01 – VITA Volunteer<sup>1</sup>
- Passwords are case sensitive and must be at least 8 characters long
- Tax professionals looking to obtain CPE credits need to put in a PTIN so that they can obtain their CPE/CE credits.
- Professional Status for Continuing Education (CE) Credit should be completed *only* by lawyers, CPAs, Enrolled Agents and other qualified professionals who are eligible to complete the Tax Law Update exam<sup>2</sup>. All other volunteers should leave this field blank.



The screenshot shows the VITA/TCE Central website interface. At the top, there is a navigation bar with the VITA/TCE Central logo and the IRS logo. Below the navigation bar, there are three main sections: Certification Tests, Instructor Tools, and Quick Links. The Certification Tests section contains a login form with fields for Login Name (gracieb83) and Password (masked with dots). Below the password field, there is a 'Login' button and a 'Create Account' button, which is highlighted with a red circle. There are also links for 'Forgot Password? CLICK HERE' and 'Need Password assistance? Contact us by clicking here'. The Instructor Tools section includes links for Classroom Presentations, Lesson Plans, and Instructor Guide 4555e. The Quick Links section includes links for Link & Learn Taxes Lessons, Certification Test/Retest PDFs, VITA/TCE Training Guide PDFs, Evaluations, Practice Lab, VSOC Training, and Intake/Interview and Quality Review Training. There is also a 'More Help' section with links for Getting Started Tutorial, IRS Publications and Forms, and Get Adobe® Reader®.

Login using your new information.

Complete your exams.

All volunteers must take the following exams:

- Volunteer Standards of Conduct ([Training](#))
- Intake/Interview & Quality Review ([Training](#))
- Basic or Advanced Exam<sup>3</sup>

All exams are untimed, open book, and you can save your answers to complete the exam later. You may use all available resources to answer the questions. The passing score is 80%, and you will have 2 attempts.

You will need

- Volunteer Resource Guide ([Publication 4012](#)) – this contains all of the information you need to complete an accurate return.

<sup>1</sup> The other Group options, including TCE – AARP volunteer, should only be used if you have been instructed to use that group number.

<sup>2</sup> Qualified Professionals include: Enrolled Agents, Non-Credentialed Tax Return Preparers, Certified Public Accountants (CPA), Certified Financial Planners, and Attorneys.

<sup>3</sup> Qualified professionals will complete the Tax Law Update section. Please see the IRS website for more information on the [Certification Text for Circular 230 Professionals](#).

- VITA Test/Retest ([Publication 6744](#)) - This is the printed certification exam. It will have the same questions that will be on the exam.

The Basic and Advance certification exams consist of two parts (remember: you do not need to complete the Basic exam before taking the Advanced exam):

- Part 1: These scenarios do not require you to prepare a tax return. Read the interview notes for each scenario carefully and use your training and resource materials to answer the questions after the scenarios.
- Part 2: These scenarios require you to prepare a tax return. Read the interview notes and complete the tax return using the [Practice Lab](#).

After you have successfully completed the return using your resource materials, answer the corresponding questions based on the tax return that you just prepared. Example: A question may be “What is the amount listed on the 1040-line 8a?”

*Recommendation:* work through the scenarios and answer the questions on the answer sheet within the VITA Test/Retest publication, then log into the Link & Learn Certification website to input your answers.

The screenshot shows the VITA/TCE Central website interface. At the top, it says "Welcome Sarah! | Logout" and "IRS". Below the header, there are tabs for "Basic", "Advanced", "Military", "International", "Puerto Rico", and "Foreign Student". The "Basic" tab is selected. A table displays exam results:

| Course name   | Score    | Pass/Fail (click for results)                             | Attempts (2 attempts per exam allowed) |
|---|----------|---|--|
| <a href="#">2015 Volunteer Standards of Conduct - Exam</a>    | 100.00 % | <a href="#">Pass</a><br><a href="#">Print Certificate</a> | 1                                      |
| <a href="#">2015 Intake/Interview and Quality Review Exam</a> | 100.00 % | <a href="#">Pass</a><br><a href="#">Print Certificate</a> | 1                                      |
| <a href="#">2015 Basic Exam</a>                               | 100.00 % | <a href="#">Pass</a><br><a href="#">Print Certificate</a> | 1                                      |
| <a href="#">2015 Health Savings Accounts (HSA) Exam</a>       |          |   | 0                                      |

Below the table, there is a red arrow pointing to the text "Not required". To the right of the table, there is a sidebar with instructions:

- You may sign your Volunteer Agreement electronically by checking this box. Sarah Nylund 11/19/2015
- Click here to open and complete your Volunteer Agreement. Click Print from the file menu to print the page.
- Save the Volunteer Agreement for your records.
- 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.

After completing the exam, you will see your score. Check off the box on the right to sign your agreement electronically. Save a copy of your certification and volunteer agreement

### Step 3: Tax Prep

**You're now ready to help New Yorkers keep their whole refund!**

Contact an NYC Free Tax Prep Provider to learn about any further training and to get started as an IRS certified VITA/TCE volunteer preparer. The 2023 tax season starts in January 2023, so please complete these three steps soon to volunteer with us this filing season.