



2024-2025

Training & Certification

Step-by-Step Guide

Thank you for volunteering with United Way's Free Community Tax Service through the IRS VITA (Volunteer Income Tax Assistance) program. Your time will have a huge impact on many of our region's hardworking families!

As a VITA volunteer, you are required to become certified through the IRS. This guide will provide you with all the information you need.

HOW TO USE THIS GUIDE: Please read through this entire document BEFORE getting started. Then, go back and reference each section as you work through the steps.

If you have any questions at any point, please reach out to the VITA coordinator.

Catherine Blankensop

Catherine@unitedwaysci.org

(812) 269-1244

Tips before you get started...

- ★ **Stay positive and take it one step at a time.** If this is your first time volunteering with the program, there is a **lot** of information all at once. Remember that you will be making a huge impact on people's lives. And this program relies on caring people like you! We are here to support you through this process however you need. **Please reach out if you have questions** and remember that you will be supported by experienced volunteers at your site!
- ★ **Don't memorize, problem solve.** You are not expected to become a tax law expert overnight. This training is not about memorizing this extensive amount of information. It is about becoming familiar with the resources available that help you problem solve to find the information you need. Certifications exams are open book, just like you will have access to resources when preparing tax returns.

Free Community Tax Service Positions

Intake Specialists

Duties and expectations:

- Welcome taxpayers to the site and help direct them
- Administer the IRS Intake Form for taxpayers and help with questions
- Assure that taxpayers have all the documents and information that they need
- Work with site coordinators to assign taxpayers to available preparers

Certifications required:

- Volunteer Standards of Conduct (VSOC)
- Intake/Interview and Quality Review

Certified Tax Preparers

Duties and expectations:

- Complete tax returns for taxpayers
- Answer taxpayers' questions politely and confidently
- Perform Quality Review on other preparers' completed forms

Certifications required:

- Volunteer Standards of Conduct (VSOC)
- Intake/Interview and Quality Review
- Choose between Basic Test or Advanced Test (Advanced recommended)
- For City Hall site preparers only: Over the Phone Interpretation (OPI)

Lead Preparers

Duties and expectations:

- All responsibilities of certified preparers
- Train new tax preparers and intake specialists
- Work closely with the site coordinator to help support the site and appointments

Certifications required:

- Volunteer Standards of Conduct (VSOC)
- Intake/Interview and Quality Review
- Advanced Test
- For City Hall site preparers only: Over the Phone Interpretation (OPI)

STEP 1: Enrollment and Resources

➤ Tax Hero Application

If you have not already filled out the [Tax Hero Application](#) through United Way, please do so as soon as possible. This is how we track volunteer communication and participation.

➤ IRS Link and Learn

Link and Learn is the official IRS training site. **For the 2024-2025 VITA season, the Link and Learn site is newly updated.** Please be sure to read this section in full and be patient as we learn the new site together.

Access the site by visiting www.linklearncertification.com.

Click the “Start Learning” button to log in or create an account. If you have made an account in previous years, it will still exist. **Be sure to write down your login information!**

If you run into trouble using Link and Learn, see the [Link and Learn Getting Started Guide](#) created by the IRS.

➤ Certification Resources

You can find a copy of all certification materials in the shared Google drive: [24-25 Tax Hero Certification Materials](#). This shared Google drive includes:

- A copy of this step-by-step guide
- [IRS Pub 6744 – Volunteer Test-Retest](#)
 - Use to practice before taking the Basic or Advanced Exams (tax preparers)
- [IRS Pub 5883 – OPI Training](#)
 - Review and use as a reference for the OPI Exam (City Hall preparers)
- [IRS Pub 5101 – Intake/Interview Training](#)
 - Review and use as reference for the Intake/Interview and Quality Review Exam (all volunteers)
- [IRS Pub 4961 – VSOC/Ethics Training](#)
 - Review and use as reference for the VSOC Exam (all volunteers)
- [IRS Pub 4491 – VITA Training Guide](#)
 - Review before taking the Basic or Advanced Exams (tax preparers)
- [IRS Pub 4012 – VITA Resource Guide](#)
 - Review and use as reference when completing IRS Pub 6744 or other practice exams, when taking the Basic or Advanced Exam, or when completing client tax returns (tax preparers)

You can review Link and Learn Training Modules on each tax topic at the [VITA Site Map](#). These topics follow the same topics included in [IRS Pub 4491](#). You can use whichever suites you best.

***Note:** there are 6 additional topics under the “Advanced Menu” for the Advanced Certification. **We highly encourage everyone to take the Advanced Exam.** The Advanced Certification allows you to prepare returns for all clients that use the Free Community Tax Service. Being certified at this level helps the sites run smoothly, as we see “advanced” tax situations regularly.

***Note: If you take the Advanced Exam, you do not need to take the Basic Exam.** All topics in the Basic Exam are covered in the Advanced Exam.

REMINDER: You are not expected to memorize all the information in these materials. You should aim to feel confident using these materials as resources. All exams are open-note and are not timed.

➤ **Training Meetings**

All training meetings are available to attend in-person or via Zoom. Some training meetings will be recorded for your reference if you are unable to attend. Please fill out this [RSVP form](#), if you have not already, to be included in the Outlook Calendar invites.

Training Dates:

- **Tuesday, December 10, 6:30-7:30 pm – Working with Taxpayers 101**
 - United Way office (431 S College Ave) or via Zoom. (Will be recorded)
 - This quick class will inform volunteers how to work with taxpayers, especially handling sensitive information. (All volunteers)
- **Tuesday, January 14, 6:30-7:30 pm – VITA Kick-Off Meeting**
 - United Way office (431 S College Ave) or via Zoom. (Will be recorded)
 - This meeting will kick off the tax season and will go over the certification process and site procedures. (All volunteers)
- **Saturday, January 19, 9am – 1pm – Tax & Software Training**
 - Ivy Tech Room B201 (200 Daniels Way) or via Zoom. A handout from this meeting will be available.
 - Hosted by Ivy Tech Accounting and Tax Professor, this training will cover 1) the basics of tax law and how to pass the certification exam, and 2) how to use TaxSlayer, the IRS-provided software used to prepare returns. (All volunteers welcome, but much of the content is relevant to tax preparers)

STEP 2: VSOC and Intake/Interview

All volunteers are required to take the Volunteer Standards of Conduct (VSOC) Exam and the Intake/Interview and Quality Review Exam. These exams are rather straightforward, and they focus primarily on ethics, policies, and processes. You will not encounter any tax law questions on these exams. All exams are open note and have no time limit.

➤ Preparing for the VSOC and Intake/Interview Exams

Before taking the exams, review IRS [Pub 4961](#) and [Pub 5101](#). These contain all the information you need to prepare. **Reminder:** you can reference these documents while taking your exam.

➤ Take the VSOC and Intake/Interview Exams

This process looks a little different for 2024-25 because of the new Link and Learn site. These two exams are included in the “courses” for the Basic and Advanced Tax Preparers. **Even if you are planning to volunteer as an Intake Specialist, you will click on one of these “courses” in order to access the VSOC and Intake/Interview Exams.** All volunteers should follow these steps when they are ready to take these exams:

1. Log into [Link and Learn](#).
2. Navigate to “Certifications” at the top menu bar
3. Select either “01 - Basic” or “02 - Advanced”
 - a. **Intake Specialists** can choose either of these options. You will not be taking the tax law portion of these courses, so it does not matter which you choose.
 - b. **Tax Preparers** should choose the course for the level you plan to get certified at.
Reminder: if you are planning to take the Advanced Exam, you do not need to take the Basic Exam.
4. Take the “Volunteer Standards of Conduct – Test”. You have two chances to get a score of 80% to qualify to volunteer. If you do not meet that score on your first try, review the study materials before trying again. Don’t hesitate to reach out for help!
5. Take the “Intake/Interview and Quality Review – Test”. You have two chances to get a score of 80% to qualify to volunteer. If you do not meet that score on your first try, review the study materials before trying again. Don’t hesitate to reach out for help!
6. Once you have completed the exams, please fill out this [Google Form](#) to inform the VITA Volunteer Coordinator.

****AT THIS POINT: Intake Specialists should skip to STEP 5 on PAGE 8 to print their volunteer agreement. Tax Preparers should continue to STEP 3.****

STEP 3: Tax Preparer Certification Exams

Reminder: We highly recommend that all tax preparers take the Advanced Exam. This will allow you to work with more taxpayers at your site.

➤ Practice Doing Returns

Use the TaxSlayer Practice Lab vita.taxslayerpro.com/IRSTraining to practice the software and complete practice tax returns.

The Access Code to log in is **TRAINPROWEB**. This will take you to a page to set up a username and password for the practice lab. There are lots of helpful videos and resources on this site.

[For more information about using the Practice Lab, read “Using the Practice Lab Guide”.](#)

***Note:** You can use the sample scenarios in [IRS Pub 6744](#) to practice entering information into the TaxSlayer Practice Lab. You will have to make up SSN’s, but all other info is provided.

➤ Getting Ready for the Exams

Practice your knowledge using [IRS Pub 6744](#) and the [TaxSlayer Practice Lab](#). Identify areas and topics where you need additional training. The test scenarios are designed to test your ability to apply tax law; they are often more challenging than returns you’ll see. ***Don’t get discouraged!***

If you are taking the Advanced Exam, be sure to review all topics included. Reminder that all preparers are strongly encouraged to take the advanced exam.

***Note:** The test questions in [IRS Pub 6744](#) are used on the certification exam. You can complete the questions using [IRS Pub 6744](#) and fill them in on the exam.

***Additional Resource:** vitaresources.net is a site managed by another United Way that has VITA sites. There are tons of resources here, including helpful tutorials by topic, and [practice tests!](#) The Practice Tests are Google Forms that you can take as many times as you want.

When you identify your trouble topics:

- ✓ Use your reference materials – IRS [Pub 4491](#), [Pub 6744](#), and [Pub 4012](#) are your best resources.
- ✓ Study using the IRS’ [Link and Learn training site](#) for interactive lessons. These lessons will frequently refer to [Pub 4491](#).
- ✓ Visit vitaresources.net to review tutorials by topic.
- ✓ [Contact the VITA coordinator](#); we can set you up with an experienced volunteer to help you work through more difficult problems.

➤ Take the Exams

If you're feeling ready, it's time to take the exam! Reminder, this is open note and is not timed. You will have two chances to score 80% or higher. Follow these steps to take the exam:

1. Log into [Link and Learn](#).
2. Navigate to "Certifications" in the top menu bar.
3. Return to the Basic or Advanced course where you took your VSOC and Intake/Interview Exams.
 - a. **Reminder:** all preparers are highly encouraged to take the **Advanced Exam**.
 - b. **Note:** if you started with one course for the first two exams and would now like to switch, select the course (Basic or Advanced) that you would like to switch to. You do not need to take the VSOC or Intake/Interview Exams a second time – skip these and go straight to the Basic or Advanced Exam.
4. Select the exam and begin! Take your time and use your resources.
 - a. If you score under 80%, review your incorrect answers, study some more, and try again. Don't hesitate to reach out for help!
 - b. If you score over 80%, congrats! You are certified.

****At this point, if you are volunteering at any site other than the City Hall site, skip to STEP 4 on Page 8 for information in Indiana state returns. City Hall volunteers should continue to complete OPI certification.****

➤ City Hall Volunteers and Over the Phone Interpretation (OPI)

Because Bloomington City Hall is our designated multi-lingual site, we are asking all City Hall volunteers to become certified in Over the Phone Interpretation (OPI). This will allow you to help prepare returns for taxpayers in whatever language they need. The exam covers how to use the OPI system and how to ensure sites are accessible to limited English proficient individuals.

Note: You do **not** need to pass this certification to qualify to volunteer at this site. However, we are asking that you please attempt the exam. Having the OPI certification will help our City Hall site serve Bloomington's refugee and limited English proficient populations. Thank you!

At the time of updating this guide (12/18/24), the OPI Exam has not yet been made available on Link and Learn. You will be notified as soon as it is available. Once it is, follow these instructions:

1. Review [IRS Pub 5883 – OPI Service Training](#). You will be able to reference this document while taking the exam.

2. Log into [Link and Learn](#).
3. Navigate to “Certifications” in the top menu bar.
4. Scroll down until you find the OPI course.
5. Select the course and take the exam.
 - a. You will have two attempts to score an 80% or higher
 - b. If you do not successfully obtain this certification, **do not worry**. You are still more than welcome to volunteer at the City Hall site. But please try your best to obtain the certification. Thank you!

STEP 4: Indiana Volunteer Handbook

Although there are no certification exams for Indiana state returns, the State Department of Revenue publishes a guide each year to help volunteer preparers with accurately preparing state returns. It is relative straight-forward and will help you greatly with state returns.

Please visit the [Indiana DOR Volunteer Tax Preparers webpage](#) and read through the Indiana Volunteer Handbook carefully.

STEP 5: Sign Volunteer Agreement Form

Once you have passed all your exams, you are a certified Tax Hero! Congratulations, and thank you for all the time and hard work you’ve put into this.

You must sign an IRS volunteer agreement form before you begin volunteering. It is available to sign easily through Link and Learn. Follow these steps to sign:

1. Log into [Link and Learn](#), if you are not there already.
2. Navigate to “Volunteer Agreement” in the top menu bar.
3. Check to ensure that under “Completed volunteer certification levels” are the names of all the certification exams you passed.
4. Fill in all the required fields
 - a. “Training Source” should be auto populated with “Link and Learn Taxes (e-Learning)”.
 - b. Fill in “Sponsoring partner name/site name” with “United Way of South Central Indiana”.
 - c. Select the number of years you have volunteered with VITA, including any prior years you may have with a VITA site at a different location.
 - i. If you do not know the number of years, email Catherine Blankensop at catherine@unitedwaysci.org
 - d. Leave “Professional designation” BLANK.
 - e. Under “Volunteer Position(s)” select “VITA Volunteer”.

- i. City Hall volunteers should also select “SPEC OPI Volunteer”
5. Click the check box to agree to sign, then click the button to sign.
6. Click the button that reads “Download signed form.”
7. EMAIL this document to Catherine Blankensop at catherine@unitedwaysci.org AND please SAVE this document for your records. You will be asked to PRINT and BRING this document to your site orientation or first day of volunteering.

Congratulations, you are done with the Tax Hero certification process!

Please remember to look out for emails from the VITA Coordinator, Catherine Blankensop, as we get closer to the tax season. Important information will be distributed via email.

Thank you so much for your hard work getting through this process, and for volunteering your time to this program. Many hardworking individuals and families are impacted greatly by this program, and we couldn't do it without you!

If you have any additional questions, feel free to reach out to the VITA Coordinator:

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