

# CERTIFICATION INSTRUCTIONS

2010-2011 Tax Season

Updated 1/6/11

**All Tax Preparers and Reviewers MUST pass a certification test and submit a signed Volunteer Agreement at their first volunteer tax site shift at each tax site where they volunteer.** (See below for instructions on printing Agreement)

## Certification Testing Options

### A) In-Person Exam (required for 1<sup>st</sup> and 2<sup>nd</sup> year volunteers)

Registration for all in-person certification options is available on VolunteerHub ([www.dceitc.volunteerhub.com](http://www.dceitc.volunteerhub.com)).

- **Basic Certification** (required for new volunteers)
- **Intermediate Topics & Certification Class** (this class, or basic certification required for 2<sup>nd</sup> year volunteers & 3+ year volunteers who have not yet taken this class)
- **Advanced Topics & Certification (optional for all students)**

### B) On Your Own Exam, using *Link and Learn*

Available for volunteers with 3 or more years of experience. 1st and 2nd year volunteers must attend a certification class.

## Using the On-Line Practice Lab (for practice and testing)

*Volunteers completing the in-person Certification will receive instructions in class.*

Completion of the certification test requires preparing several tax returns. Volunteers are strongly encouraged to use Practice Lab to complete the tax returns. You can also use the Practice Lab to practice preparing tax returns. Note: the Practice Lab is based on TaxWise Online interface and is a bit different from the TaxWise desktop interface used at most of the tax sites.

**WARNING:** You must use **Internet Explorer** for the Practice Lab to function correctly.

- In Internet Explorer, go to: <http://www.voltaxprep.com/>
- Log in using the **password learntwo**
- Each year, the first time you log in, you need to create a unique **User ID. WRITE DOWN YOUR 6-digit User ID.** It **cannot** be retrieved if it is lost or misplaced.
- See the blue tabs in the 4012 for tips on using TaxWise Online. See page 7-2 (page 113 in the PDF) for the shortcuts and how to get the red out. See page 8-5 and 8-6 for navigating and linking (pages 118-119 in the PDF)
- There is also a tutorial on the home page of the Practice Lab that provides guidance.
- You can save your work by using the **save button** at the top of the screen. When you log back into the Practice Lab with your UserID use the link "Show All Returns."
- While in a return, you need to press "save" for automatic calculations to happen. Example: after entering wages into box 1 of the W2, you need to click save (on the button bar at the top of the screen) for boxes 3, 4, 5, and 6 to calculate
- You will use your User ID to complete the SSNs and EINs when creating returns. The first three numbers of the SSN and EINs are provided in the scenarios. Replace the X's in the SSNs and EINs with the six digit User ID generated from the Practice Lab.
- NOTE: Practice Lab has an error Form 8863, Education Credits, page 2. Part III, Refundable American Opportunity Credit, and Part IV, Nonrefundable Education Credits are incorrectly labeled Part IV and Part V, respectively. This error will be corrected for the live software, but not in the Practice Lab.
- The **diagnostics functionality is not available** in the Practice Lab.

## How to Use the Link & Learn Test

### **IMPORTANT. READ THIS BEFORE TAKING THE TEST:**

- (1) Link & Learn pulls questions from both the test and retest sections of the paper certification test (Form 6744). If you complete the test by hand before submitting online, be sure to answer both the test AND the retest questions first.
- (2) Complete the basic tax returns from scenarios 6 & 7 before starting the online test. You can prepare the returns by hand, or use the on-line Practice Lab. (See p. 1). If preparing returns by hand, one copy of each form is available starting on page F-1 in the test booklet. You will need to make copies if you need more forms. The tax tables and EIC tables are included in Pub. 4491-W, the Comprehensive Problems workbook.
- (3) **You can get more training at the IRS Link & Learn site: <http://www.irs.gov/app/vita/>**

To log in to the test, go to: <http://linklearn.webtechteam.com/login.aspx>

- Click "Create an Account"
- You will be taken to the registration form
  - For **Group**, enter "1-VITA Volunteer"
  - After filling in remaining information, click **Register**.
- After confirming your information, you will be taken back to the login screen where you can log in right away. An email with your username and password will also be sent from "DONOTREPLY@sysalerts.com" with the subject "Your LMS account has been created".
- After you log in to begin your test:
  - If you do not finish the test in one sitting, you can save your work.
  - This first screen shows your test progress. Click on the tab for the next certification level (e.g. "Basic", "Intermediate", "Advanced") that you would like to complete.
  - Click the name of the next test that you would like to complete (e.g. "Basic Exam", "Intermediate Exam", "Advanced Exam").

## Printing & Submitting Test Results & Volunteer Agreement

After completing your final test:

1. On the far right of the screen you will see an option to "**Click here to open and complete your Volunteer Agreement**".
2. Click on the link. It will generate your volunteer agreement with your test results.
3. **Print and sign your Volunteer Agreement** (the page that shows your score(s)).
4. Make a copy of the Volunteer Agreement for yourself.
5. **All volunteers: take the printed and signed volunteer agreement to your tax site the first day you volunteer.**
6. **Reviewers and Trainers:** Also submit your test results to CTA one of these ways;
  - ♦ **Fax:** 202-521-3988 (no cover letter necessary)
  - ♦ **Email:** [taxtestresults@yahoo.com](mailto:taxtestresults@yahoo.com), or
  - ♦ **Mail:** Community Tax Aid, 218 D Street SE, 1<sup>st</sup> Floor, Washington, DC 20003

## Training Materials

Training materials will be handed out at training, and are also available on-line:

- IRS Link & Learn Training: <http://www.irs.gov/app/vita/>
- Volunteer Test Book: [http://www.communitytaxaiddc.org/doc/2010\\_f6744.pdf](http://www.communitytaxaiddc.org/doc/2010_f6744.pdf)
- Pub. 4012: [http://www.communitytaxaiddc.org/doc/2010\\_p4012.pdf](http://www.communitytaxaiddc.org/doc/2010_p4012.pdf)
- Volunteer Training Book: [http://www.communitytaxaiddc.org/doc/2010\\_p4491.pdf](http://www.communitytaxaiddc.org/doc/2010_p4491.pdf)
- Pub. 17: <http://www.irs.gov/pub/irs-pdf/p17.pdf>
- 4491W: <http://www.irs.gov/pub/irs-pdf/p4491w.pdf>