

VITA Training Portal: <https://www.unitedwayrgv.org/vitatrainingportal>

Volunteer Income Tax Assistance (VITA)

VITA Certification Plan



United Way
of Southern Cameron County

INTRO: Start at the IRS' training platform called VITA Central at www.linklearncertification.com. VITA Central contains links for steps outlined below. You will also need this link:

<https://prosperitynow.org/vita-train>. Pick up any print training materials at the United Way office starting in November.

STEP 1 - Study:

___ Study Tax Law. United Way recommends that new volunteers certify at Basic level using the VITA-Train modules (1-13) to study tax law in conjunction with the e-pub 4491 Training Guide. Returning volunteers and those with previous tax accounting knowledge should certify at Advanced level using e-pub 4491 Training Guide and VITA Central's LLT Taxes Lessons as well as referencing Module 12 of VITA-Train. Below are the available curriculum options:

Curriculum: VITA-Train: This innovative, free online training curriculum features 12 plug-and-play modules designed to help volunteers prepare for the IRS Basic Volunteer Certification Test. Module 12 has information for Advanced volunteers also. Curriculum is available in video and pdf format at <https://prosperitynow.org/vita-train>.

Curriculum: Publication 4491: VITA Training Guide is a textbook teaching VITA tax law. It is available online. Search keyword "e-pub 4491" at irs.gov or find a link at VITA Central. In the training guide icons will indicate the certification level of tax topics within the lessons: a single-book icon for Basic topics and a stacked-book icon for Advanced topics. You choose one certification level: Basic or Advanced.

Curriculum (Optional): VITA Central provides tax law lessons and tutorials. Go to VITA Central -> **Link & Learn Taxes Lessons**. The tutorial will reference PUB 4491 Training Guide. Read United Way's study plan about how to use the LLT Online Tutorial if choosing this method of study. (See attachment.) This platform, while very thorough, can be a bit confusing, so we recommend that new volunteers begin with VITA-Train modules instead.

___ Study PUB 4961 Volunteer Standards of Conduct (at VITA Central -> VSOC Training)

___ Study Intake/Interview and Quality Review Training (at VITA Central -> Intake/Interview and Quality Review Training)

STEP 2 - Practice:

___ Read the Practice Lab fact sheet handout.

___ Create user account for Practice Lab (VITA Central -> Practice Lab).

___ Prepare scenario-based tax return problems using software at Practice Lab. You may work practice returns concurrently with studying tax law. Practice problems for both Basic and Advanced are found at:

VITA-Train: <https://prosperitynow.org/resources/vita-train-practice-returns>

Practice Lab: Section 6 on home page of Practice Lab

___ Refer to **PUB 4012: VITA Volunteer Resource Guide**, PUB 17 Tax Guide or PUB 4491 Training Guide for help while preparing practice returns. (Publications available online at irs.gov.) All volunteers receive a printed PUB 4012 from United Way, available in November, to use for training and for actual tax prep with the public. Please study the PUB 4012 and become familiar with its decision trees, charts and tips.

STEP 3 -Testing:

___ Read *Certification Testing: Getting Started* (at VITA Central -> Getting Started Tutorial)

___ Read IRS Certification Question & Answers Fact Sheet (handout)

___ Create user account for LLT Test Site (at VITA Central -> Certification Tests - Create Account). The username must be different from your Practice Lab account.

___ Test VSOC (Volunteer Standards of Conduct) at LLT Test Site. 20-30 mins.

___ Test I/I/QR (Intake/Interview and Quality Review) at LLT Test Site. 20-30 mins.

___ Prepare Basic Test Scenario Problems **6 & 8** (or Advanced Test Scenarios **6-8**) found in **IRS Publication 6744 VITA Test/Retest** on Practice Lab. Search online for e-pub 6744 at irs.gov or in print from United Way depending on availability. After preparing the scenario tax returns on practice Lab, answer both Test and Re-test questions for your certification level in PUB 6744, pages **33-62** for Basic or Pgs. **71-108** for Advanced.

___ Refer to **PUB 4012: VITA Volunteer Resource Guide**, PUB 17 Tax Guide or PUB 4491 Training Guide for help while preparing test tax returns. (Publications available online at irs.gov.)

___ Test Basic (or Advanced) at LLT Test Site. The online test pulls questions from both test and retest. Always work the test in the book before going to VITA Central's test site to fill in the online test.

___ Capture answers when you get test results. (You will not be able to see answer page again.)

Study what you get wrong by looking in PUB 4012, PUB 17 or PUB 4491. (Publications found online at irs.gov.)

___ After testing, electronically sign and download a pdf of F13615 Volunteer Agreement Form and email to taxproject@unitedwayrgv.org. Send the form from within the test site that comes pre-loaded with your test results. This must be submitted to United Way before working with the public.

Step 4 :

___ **Attend mandatory 3-hour VITA Coalition Training held in January (TBA).** Volunteers must be certified in tax law before attending the January training. Training will be held virtually.

___ Sign up for volunteer service hours. We ask that you volunteer at least 3 hours per week for the first 6 weeks of the tax season, hopefully more if you enjoy it!

___ Review PUB 4491x Supplement to get any edits that you need to make in your printed PUB 4012 Resources Guide or congressional changes to tax law before working with the public in tax preparation.

___ Prepare tax returns for the public at local VITA sites beginning January 24 through April 15.

___ UTRGV Students: Contact United Way no later than **February 15** to confirm your certification and volunteer service hours.

For VITA Training Information please contact us at taxproject@unitedwayrgv.org or (956) 548-6880 or @vitascc on FB.