

Volunteer Income Tax Assistance (VITA)

VITA Certification Plan



INTRO:

Start at the VITA Training Portal at <https://www.unitedwayrgv.org/vita-volunteer-training>. Here you'll find all publications, links, and resources mentioned below.

To certify, use the IRS' training platform called VITA Central at www.linklearncertification.com.

Pick up print training materials at the United Way office starting in mid-November.

STEP 1 - Study:

__ **Study PUB 4961** Volunteer Standards of Conduct (at VITA Central -> VSOC Training or VITA Training Portal)

__ **Study PUB 5101** Intake/Interview and Quality Review Training (at VITA Central -> Intake/Interview or VITA Training Portal)

__ **Study Tax Law**. United Way recommends that new volunteers certify at Basic level. Returning volunteers and those with previous tax accounting knowledge should certify at the Advanced level.

Below are the available curriculum options:

Curriculum: Publication 4491: VITA Training Guide is a textbook teaching VITA tax law. 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. **Electronic version only.**

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

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. This platform, while very thorough, can be a bit confusing, so we recommend that new volunteers begin with VITA-Train modules instead.

STEP 2 – Practice:

__ Read the Practice Lab Fact Sheet available in the VITA Training Portal.

__ **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/vita-train>
- 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. and VITA Training Portal) Please study the PUB 4012 and become familiar with its decision trees, charts and tips. **Available for pick up in Nov.**

STEP 3 -Testing:

Pub 6744 contains the questions that will be asked in the exam. Answer the questions in your book prior to entering them in LinkandLearn. **Available for pick up in Nov.**

- ___ Read Certification Testing: Getting Started (at VITA Training Portal)
- ___ Read IRS Certification Question & Answers Fact Sheet (available in the VITA Training Portal)
- ___ 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. 10 questions.
- ___ **Test I/I&QR** (Intake/Interview and Quality Review) at LLT Test Site. 20-30 mins. 10 questions.
- ___ **Prepare Basic Test Scenario Problems 7-9 (or Advanced Test Scenarios 7-9)** found in IRS Publication 6744 VITA Test/Retest on Practice Lab. Answer the test questions on paper as you prepare the scenarios.
- ___ After passing with an 80% or above, 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 – Train

- ___ **Attend** mandatory 4-hour VITA Coalition Training held in January (See training schedule). Volunteers must be certified in tax law before attending the January training. **Refer to training schedule for location.**
- ___ **Sign up** for volunteer service hours. We ask that you volunteer at least 6 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.
- ___ UTRGV Students: Contact United Way before the deadline provided to confirm your certification and volunteer service hours.

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

Volunteers: Please consider certifying up to Advanced to be able to help prepare returns for people with self-employment income (side businesses), HSA and the Advanced Premium Tax Credit. This is a big need at our VITA sites. Note: Advanced test covers all Basic material, 2+so you don't have to test Basic before testing for Advanced.