

CTA Preparer & Reviewer Certification Instructions

Tax season 2017-2018 (1/2/2018)

Get Ready to Test

- Take Volunteers Standards of Conduct Training: <https://www.irs.gov/pub/irs-pdf/p4961.pdf>
- Take Intake/Interview & Quality Review training: <https://www.irs.gov/irs-pdf/p5101.pdf>
- Review training materials
 - Available in paper at in-person training or the CTA office and at www.irs.gov: Volunteer Resource Guide ([Pub. 4012](http://www.irs.gov/pub/irs-pdf/p4012.pdf)); Volunteer Test Book ([Pub. 6744](http://www.irs.gov/pub/irs-pdf/p6744.pdf))
 - Additional online materials: Volunteer Training Book (www.irs.gov/pub/irs-pdf/p4491.pdf), IRS Link & Learn Training: <http://www.irs.gov/app/vita/>

How to Register for Certification (where to log in to take the exams)

- Go to: <https://www.linklearncertification.com>
- Log In using last year's username and password, or "Create Account".
If you logged in using last year's information, click on the "My Account" tab to verify and update your information- especially "years volunteered"
- For **Group**, enter "1-VITA Volunteer", UNLESS you are also an IRS employee (# 08).
- For Training Source, select "other".
- "Continuing Education Credit" & "PTIN number" Leave these blank unless you are a tax professional applying for IRS issued CE credit.
- **Remember to write down your username and password. (Or better yet, email it to yourself.)**
- After filling in all the information:
 - If you are updating, click the "save" button at the bottom of the screen.
 - If you created a new account, click **Register**. (The button is to the right at the bottom.)

Volunteer Standards of Conduct (VSC)

- **Every year, you must take the VSC training, before taking the exam.** (see above)
- Click on: "2017 Volunteer Standards of Conduct - Exam".
- When the message box pops up, click on "launch" (If you don't see the link, use a different browser.)
- After you submit your answers, you will see your score. Below your score, you will see an option "Print Certificate". **Do not do this.** Scroll back to the top and click the "x" to close the window.
- You will be returned to the screen listing the courses. If you don't see the word "pass" or "fail" in the Score column, refresh your browser.

Intake/Interview

1. **If you are a first year volunteer, you must take Intake/Interview training.** (See above)
2. Click on: "2017 Intake/Interview and Quality Review - Exam".
3. When the message box pops up, click on "launch"
4. After you submit your answers, you will see your score. Below your score, you will see an option "Print Certificate". **Do not do this.** Scroll back to the top and click the "x" to close the window.
5. You will be returned to the screen listing the courses. If you don't see the word "pass" or "fail" in the Score column, refresh your browser.

Tax Law Exams

- See "Using the On-Line Practice Lab" section on p. 2 for instructions on using the software to prepare tax returns to answer exam questions. The tax returns you will need to prepare are found in the IRS test booklet. This book will be handed out at training, and can be found online at: <https://www.irs.gov/pub/irs-pdf/f6744.pdf>. [Click here for missing page from printed version.](#)
- To take the tax law exam, go to: <https://www.linklearncertification.com> and log in if needed.
- First year volunteers will take the BASIC exam. Returning volunteers will click on the "Advanced" tab and take the ADVANCED exam.
- We recommend that you record your answers in the test book, or by printing/saving the review your answers screen, before submitting. This way, if you get an answer wrong, you will know what answer you submitted.
- **After completing your exam(s), do not print the certificate(s).** See page 2 for instructions on printing and submitting your Volunteer Agreement.

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

Completion of the certification test requires preparing several tax returns. You can use the practice version of the tax software to prepare these tax returns.

- Rockville, Arlington and HOPE volunteers will be using TaxSlayer and should follow the instructions below to enter the TaxSlayer Practice software.
- All other volunteers will use TaxWise at their sites, and will receive a TaxWise practice login when they attend in person training. But everyone is welcome to use TaxSlayer to work on the test scenarios and can follow the instructions below.

TaxSlayer Practice Lab Instructions

- Go to: <https://vita.taxslayerpro.com/IRSTraining/en/Account/Access>
- For the password, enter "TRAINPROWEB"
- If you set up an account last year, you can use the same username and password. (If you are asked for a password that the IRS provided to you, use TRAINPROWEB)
- To create a new account, click on "Create Account", to create your account
 - For program type, select "VITA".
 - For SIDN, leave blank
- For an overview of using TaxSlayer, you can scroll down to view the videos under Sections 4 & 5
- **To get started**, Click on "Go to Practice Area"
- To the right of "Start New Tax Return", click on "select"
- To find returns, you have already started, to the right of "Client Search", click on "select"
- You can keep up to date on TaxSlayer software changes at <https://vitablog.taxslayerpro.com/>

TaxWise Log In Instructions

- Go to: <https://twonline-17.taxwise.com/>
 - Client ID: **80047244**
 - The username is your first initial and last name all in lower case letters
 - The initial password is the same as your username
- If you are in a class where you are using the 2016 software:
 - Log in at: <https://twonline-17.taxwise.com/>
 - Now navigate to: <https://twonline-16.taxwise.com/>
(Just change the "17" to "16")
You may be logged out and need to log in again.

Printing & Submitting Volunteer Agreement

After completing **ALL** of your training and test(s):

1. On the right side of the screen, you will see a box that says, "You may sign your Volunteer Agreement electronically by checking this box." **Click the box**
2. Under the box, you will see "**Click here to open and complete your Volunteer Agreement**".
3. Click on the link. It will generate your volunteer agreement with your test results.
4. Click on the printer icon to print the form. [If you are unable to print, bring your username & password your first day. Your Site Coordinator will help you print your agreement.]
5. **Take your photo ID and volunteer agreement to your tax site the first day. (If you volunteer at more than one site, you will need to take one to each site.)**
6. **ONLY Reviewers, Trainers, and Site Coordinators:** also submit your agreement to CTA;
Fax: 202-521-3988 (no cover letter necessary), or **Email:** taxtestresults@yahoo.com