

# CTA Preparer & Reviewer Certification Instructions

## Tax season 2018-2019 (1/9/19)

### Training Resources

- **Publications:** available in paper at in-person training or the CTA office AND at [www.irs.gov](http://www.irs.gov): Test Book (<https://www.irs.gov/pub/irs-pdf/f6744.pdf>); Text Book ([www.irs.gov/pub/irs-pdf/p4491.pdf](http://www.irs.gov/pub/irs-pdf/p4491.pdf))
- **Vol Resource Guide (4012):** Download to view electronically ([www.irs.gov/pub/irs-pdf/p4012.pdf](http://www.irs.gov/pub/irs-pdf/p4012.pdf));
- **REQUIRED Pre-Training for first year preparers:** <https://tinyurl.com/y7h8ls82>
- **New tax overview for returning preparers & reviewers:** Module 12 at [bit.ly/VITATrain](http://bit.ly/VITATrain)

### 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).
- If you are a Site Coordinator, select "Yes" for "Do you want to take the Site Coordinator Course"
- Select "Yes" for "Do you plan to volunteer in the VITA/TCE Program?"
- For Training Source, select "Other"
- **Remember to write down your username and password. (Or better yet, email it to yourself.)**
- Under "Partner/Organization Name" type "Community Tax Aid DC"
- For "Years you Have Volunteered" select "1" if this is your first year, "2" if it is your second, etc.
- "Select Profession status..." **do not fill in this field or the other remaining fields** unless you are a registered return preparer, EA, CPA, or attorney **who wants to request IRS CE credits**. More information at: <https://www.irs.gov/pub/irs-utl/FACT-Sheet-Continuing-Education-Credits-Aug-2018.pdf>
- 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 the **Register** button at the bottom of the screen to the right.

### Volunteer Standards of Conduct Exam (VSC)

- Watch Welcome to VITA / Volunteer Standards of Conduct Training: Module 01A at: [bit.ly/VITATrain](http://bit.ly/VITATrain)
- From [www.linklearncertification.com](http://www.linklearncertification.com), Click on: "2018 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 and Quality Review Exam (IIQR)

- Review Intake/Interview training: <https://www.irs.gov/pub/irs-pdf/p5101.pdf>
- From [www.linklearncertification.com](http://www.linklearncertification.com), Click on: "2018 Intake/Interview and Quality Review Exam".
- When the message box pops up, click on "launch"
- 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.

### 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 returns you will need to prepare are found in the IRS test booklet. This book will be handed out at training (if taking the advanced test, make sure you have the corrected p. 87 of the paper test book), and is online at: [www.irs.gov/pub/irs-pdf/f6744.pdf](http://www.irs.gov/pub/irs-pdf/f6744.pdf).
- To take the tax law exam, go to: [www.linklearncertification.com](http://www.linklearncertification.com) and log in if needed.
- Returning volunteers will click on the "Advanced" tab and take the ADVANCED exam. First year volunteers will take the BASIC from this tab, or click on the "Advanced" tab for the ADVANCED exam.
- We recommend you write down your answers, or print/save 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.

## Returning Volunteer / Advanced Test tips

- Even if you find you don't need to complete all the tax returns to take the test, we suggest entering practice returns prior to the start of tax season to get used to the software changes related to the new tax law. The basic and advanced test scenarios make good practice returns. More practice returns are at [bit.ly/VITATrain](http://bit.ly/VITATrain)
- For Pensions unknown Taxable amount, go to: <https://cotaxaide.org/tools> & click on **Annuity Calculator**

## 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, or prepare needed forms and instructions by hand.

## TaxSlayer or TaxWise?

- Rockville, Arlington and HOPE volunteers will be using TaxSlayer and should follow the instructions below to use 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

- Not all the tax law updates are programmed into TaxSlayer at this time, but enough have been programmed for you to take your test. For known problems see: <https://tinyurl.com/ydxnusys>
- Go to: <https://vita.taxslayerpro.com> and click on "Practice Lab"
- 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-training.taxwise.com>
  - Client ID: **80047244**
  - The username is your first initial and last name all in lower case letters
  - The starting password is your username

## Printing & Submitting Volunteer Agreement

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

### **Printing**

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.]**

### **Submitting**

5. **Attorney/CPA/EA section.** Do NOT fill this out—even if you are an Attorney/CPA or ED.
6. 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.)

Reviewers, Trainers, and Site Coordinators: also submit your agreement to CTA;

**Fax:** 202-521-3988 (no cover letter necessary), or **Email:** [taxtestresults@yahoo.com](mailto:taxtestresults@yahoo.com)