

CTA Preparer & Reviewer Certification Instructions

Tax season 2020-2021 (1/7/2021)

NEW THIS YEAR & Important Reminders:

- Your name in Link & Learn must match the name on your government issued photo ID.
- Before starting the certification exam, review the “Important Changes for 2020” in Pub. 4491 or on Link and Learn; or view Module 12 of VITA Train (see links below)
- The exams are tricky, thoroughly read all the information that is given in the scenarios. Double check what you think you know with what has changed this year. Don’t assume. Verify!
- Returning Preparers; Reviewers; Site Coordinators should certify at the ADVANCED level. Experienced volunteers can choose to take the new Qualified Experienced Volunteer (QEV) certification instead. QEV has extremely tricky scenarios.
- **For CE credit you must take Advanced.**
- All volunteer should submit their volunteer agreement electronically (by fax or email) to CTA as soon as you complete all of your certifications. See instructions on page 2 for submitting your volunteer agreement.

Training & Test Resources and tips

- **Publications:** *Online Only:* Text Book (www.irs.gov/pub/irs-pdf/p4491.pdf)
Available in paper from CTA or online: Test Book (<https://www.irs.gov/pub/irs-pdf/f6744.pdf>);
Vol Resource Guide (www.irs.gov/pub/irs-pdf/p4012.pdf),
- **IRS Link and Learn:** <https://apps.irs.gov/app/vita/sitemap.jsp> (avail mid-Nov.)
- **Taxpayer Opportunity Network VITA Train:** <https://prosperitynow.org/vita-train>
- For Pensions with unknown taxable amount, go to: <https://cotaxaide.org/tools> & click on **Annuity Calculator**
- See additional training & certification resource guides including HSA and practice problems at: <https://communitytaxaidc.org/volunteers-3/trainingseason2021/>

Using the TaxSlayer 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 and to get practice using the software.

TaxSlayer Practice Lab Instructions

Note: TaxSlayer is not completely updated. See known issues at: <https://vitablog.taxslayerpro.com/>

- To access the practice lab, go to: <https://vita.taxslayerpro.com>
- **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.
- To create a new account, click on “Create Account”. **Program type**, select “VITA”. **SIDN**, leave blank
- For an overview of using TaxSlayer, see your 4012, or scroll down to view the videos under Section 4
- **To get started**, Click on “Go to Practice Area”
- To the right of “Start New Tax Return”, click on “select” (if you don’t see this, click on “Main Menu”)
- To find returns, you have already started, to the right of “Client Search”, click on “select”

How to Register for Certification (where to log in to take the exams) (Available mid-Nov.)

- Go to: <https://www.linklearncertification.com>
- Log-in using last year’s username and password OR “Create Account” if you are new to Link and Learn.
- **REQUIRED: If you logged in using last year’s information, click on the “My Account” tab to verify and update your information using the instructions below.**
- For **Group**, “01-VITA Volunteer”. Also be sure to indicate if you are an IRS employee.
- If you are a Assistant/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”
- **First and Last Name: MUST match the name on your government issued photo ID**
- 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.
- “Professional status...” **fill in this field and remaining only if you are a registered return preparer, EA, CPA, or attorney **AND** you are requesting IRS CE credits**
(To enter PTIN type P plus your number. For CTEC ID, type A plus your number)
- 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 1A at: bit.ly/VITATrain
- From www.linklearncertification.com, Click on: “2020 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 slides, [IRS p5101](http://IRS.p5101), or watch Modules 1B 1C & 1D of bit.ly/VITATrain
- From www.linklearncertification.com, Click on: “2020 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

- Before
- See page 1 for information 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 is available at the CTA office or online at: www.irs.gov/pub/irs-pdf/f6744.pdf.
- To take the tax law exam, go to: www.linklearncertification.com and log in if needed.
- Returning volunteers: click on the “Advanced” tab to take Advanced or the new QEV exam. First year volunteers: click on the “Basic” tab to take BASIC, or “Advanced” tab to take ADVANCED.
- 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 below for instructions on printing and submitting your Volunteer Agreement.

Printing & Submitting Volunteer Agreement

Signing & Printing (Complete ALL of your exams before completing these steps)

1. Before printing, make sure you clicked on the “My Account” tab and updated your information according to the instructions above. [To request CE credits fill in fields at the bottom of the form.]
2. 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**
3. Under the box, you will see **“Click here to open and complete your Volunteer Agreement”**.
4. Click on the link. It will generate your volunteer agreement with your test results.
If you are requesting CE credit, navigate to page 2 of the agreement and digitally sign the agreement (if unable to digitally sign, you will need to print and manually sign the agreement.)
5. **On page 2 of the PDF, you will see a “Professional designation” section.**
Do NOT fill this out—even if you are an Attorney/CPA or EA.
6. Save the pdf to submit electronically to CTA.

Submitting

7. All volunteers should submit your agreement to CTA: **Fax:** 202-521-3988 (no cover letter necessary), or **Email:** volunteer@communitytaxaiddc.org
8. If you are volunteering in person, take your photo ID and volunteer agreement to your tax site the first day. If you are volunteering remotely, after we receive the volunteer agreement we will verify your ID remotely.

Continuing Education Credits

- If you are seeking **CE credit**, make sure you filled in the required information on the **“My Account” tab** and review important information at: <https://www.irs.gov/pub/irs-pdf/p5362.pdf>
- If you want CE credit you must fill out this form: <https://forms.gle/T7ZTF88mBBQ9rXXd6>