

INTAKE SPECIALIST CERTIFICATION



Tax Time Intake Specialists must pass the Volunteer Income Tax Assistance (VITA) Certification **each year** before volunteering at tax sites.

Quizzes - Open book, open note, no time limit - Score at least 80% to pass:

Volunteer Standards of Conduct Exam (10 questions) – *Required*

Intake/Interview and Quality Review Exam (10 questions) – *Recommended*

Steps to Take Tests:

1. Take tests in [Volunteer Test Booklet](#)
2. Logon to [IRS Link & Learn Taxes*](#)
3. Select 'Advanced' tab
4. Input and submit answers from Test Booklet

Passed? Email Signed Volunteer Agreement from Link & Learn to taxtime@uwcentralohio.org



PREPARING FOR CERTIFICATION TESTS

In-person Training: Highly recommended, take place throughout January

- 1 hour, interactive

Self-study: In addition to or in lieu of in-person training
[Prosperity Now's training videos](#): Modules 1 A-C
[Prosperity Now Interactive Training Modules](#):
Intake, Interview & Quality Review for VITA 2018

Register Online at
[taxtimecentralohio.org/
volunteer/join-our-team](https://taxtimecentralohio.org/volunteer/join-our-team)
for info on upcoming
trainings.

Books: Materials available online and in print at United Way

[Volunteer Test Booklet](#) (IRS Publication 6744): Contains test and retest questions

[Volunteer Resource Guide](#) (IRS Publication 4012): Contains detailed explanations of tax topics and tax software

[Tax Guide](#) (IRS Publication 17): Detailed reference document with definitions of tax terminology (not available in print)



PREPARING FOR TRAINING

Make two online accounts:

[IRS Link & Learn Taxes*](#): IRS portal for VITA volunteers containing study modules, certification exam and volunteer agreement