



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

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

- Volunteer Standards of Conduct Exam (10 questions)
- Intake/Interview and Quality Review Exam (10 questions)
- Advanced Exam (35 questions)
 - Part I – conceptual questions
 - Part II – mock tax return preparation (using [TaxSlayer Practice Lab](#))

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

- New volunteer trainings: 5 hours, interactive
- Returner volunteer trainings: 2 hours, advanced topics

Self-study: In addition to or in lieu of in-person training

[Prosperity Now's Training](#)

- No tax experience: Modules 1 - 11
- Some prior tax experience: 1, 10, 11, 12
- Returning VITA volunteer: Module 12

[IRS Link & Learn Training](#), Advanced Modules (10-12 hours of videos)

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)

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



PREPARING FOR TRAINING

Make two online accounts:

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

[TaxSlayer Practice Lab](#): Practice version of tax preparation software for preparing mock returns.

Access code: 'TRAINPROWEB'