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)

**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’