

# VITA CERTIFICATION PROCESS

Thank you for volunteering with our program! Dedicated volunteers, like you, are the heartbeat of our community. This guide will prepare you to successfully pass the VITA certification tests and start your volunteer impact journey. *Have a question? We're an email away – [tax@yourunitedway.org](mailto:tax@yourunitedway.org).*

## 1 All volunteers: Access your training package

- Access the United Way training webpage at [YourUnitedWay.org/volunteer/vita/training](https://YourUnitedWay.org/volunteer/vita/training)
- If you'd prefer a hard copy, email us to schedule a packet pick-up.
- Set up your Link and Learn account (see handout in packet)

Last week January / first week  
February: In-person tax sites open

2/1: Virtual tax season opens

## 2 All volunteers: Review materials

### Volunteer Standards of Conduct (VSOC)

- Review standards in Publication 4961 ([irs.gov/pub/irs-pdf/p4961.pdf](https://irs.gov/pub/irs-pdf/p4961.pdf)) or review the training modules on the United Way training site.
- Review the Volunteer Standards of Conduct Study Guide (in your packet and on United Way training site).

### Complete VSOC Test

- Complete the exam with a paper copy of Form 6744 ([irs.gov/pub/irs-pdf/f6744.pdf](https://irs.gov/pub/irs-pdf/f6744.pdf)) on page 14.
- Ready for scoring? Log into your Link and Learn dashboard and complete the "VSOC" portion of the "01 - Basic Certification" test. Exit the course when complete.



If you are volunteering as a **Greeter**, navigate to your Link and Learn dashboard and complete the Volunteer Standards of Conduct Agreement (Form 13615). **Email your e-signed agreement and a copy of your photo ID to [tax@yourunitedway.org](mailto:tax@yourunitedway.org).**  
*Returning volunteers do not need to resubmit IDs unless you've been issued a new ID in the past year.*

Due by 1/15

## Screeners / Tax Preparers / Quality Reviewers / Site Coordinators

### Intake/Interview and Quality Review

- Read Publication 5101 ([irs.gov/pub/irs-pdf/p5101.pdf](https://irs.gov/pub/irs-pdf/p5101.pdf))
- Review the Intake/Interview/Quality Review modules on the United Way training site
- For a deeper dive, watch Intake/Interview and Quality Review Training ([bit.ly/3D5RxaD](https://bit.ly/3D5RxaD)).
- Review the Intake/Interview and Quality Review Study Guide (in your packet and on United Way training site).

### Complete Intake/Interview and Quality Review Test

- Complete the exam with a paper copy of Publication 6744, starting on page 21 (<https://www.irs.gov/pub/irs-pdf/f6744.pdf>)
- Ready for scoring? Log into your Link and Learn dashboard and complete the "Intake/Interview and Quality Review" test found in "01 - Basic Certification"

## Exam Prep Tips

- Volunteers should use online materials for review and preparation even if they attend classes.
- Go to the United Way training site to access training modules provided by Prosperity Now.
- Prepare for your exam with Publication 4012 ([irs.gov/pub/irs-pdf/p4012.pdf](https://irs.gov/pub/irs-pdf/p4012.pdf)). Have this publication with you during your volunteer shift.
- Become familiar with the material. You DO NOT have to memorize any of it. Remember: Our Software does ALL calculations, selects appropriate tax forms/schedules, and is easy to use.
- Practice Problems: Find them in your training packet or on the United Way training site. The solutions are also included.

## TaxSlayer Practice Lab

- Practice preparing tax returns using the TaxSlayer Practice Lab ([vita.taxslayerpro.com/IRSTraining/en/Account/Access](https://vita.taxslayerpro.com/IRSTraining/en/Account/Access))
- TaxSlayer Practice Lab: Refer to the Practice Problems Cover Sheet to create an account. This portal should be used to get familiar with the software and enter the practice problem scenarios and scenarios from the test. This is separate from the Link and Learn testing portal.
- *Returning users:* you may use your credentials from last year or create a new account.
- The password to enter the site is **TRAINPROWEB** in all caps, then create an account.
- Leave the SIDN box empty. All other fields (E-mail, username, password, program type and the security question and response) are required. The password you choose for this Practice Lab account must contain a minimum of 15 and maximum of 25 characters, at least 1 upper case letter and 1 lower case letter, 1 number and 1 special character.
- Click on “Go to Practice Area” for the online Practice Lab or poke around the training videos.



Once you've completed the exams on Link and Learn, **email your e-signed Volunteer Agreement Form 13615 and a copy of your photo ID to [tax@yourunitedway.org](mailto:tax@yourunitedway.org)**. *Returning volunteers do not need to resubmit IDs unless you've been issued a new ID in the past year. We'll be in touch soon!*

Due by 1/15

## Tax Law Certification

- **Use the Study Guides to prepare for exams** (in your packet and on United Way training site).
- We encourage you to certify at the **Advanced** level, but it is not mandatory. 80% of the questions are on basic content (filing status, dependency, and credits, including Earned Income, Child Tax Credit, Child/Dependent Care, Education Credit). If you want to take this test you do not need to take the Basic test first.
- Tests are open book, open note. Use your paper Form 6744 ([irs.gov/pub/irs-pdf/f6744.pdf](https://irs.gov/pub/irs-pdf/f6744.pdf)) practice notes and study guides.
- When you get to a scenario with tax forms, practice in **TaxSlayer Practice Lab**.



Once you've completed your **Advanced** or **Basic** test, **email your e-signed Volunteer Agreement Form 13615 and a copy of your photo ID to [tax@yourunitedway.org](mailto:tax@yourunitedway.org)**. *Returning volunteers do not need to resubmit IDs unless you've been issued a new ID in the past year. We'll be in touch soon!*

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