



**Ceiba**

A coalition of Latino community-based organizations serving Philadelphia

Volunteer Income Tax  
Assistance Program

**VOLUNTEER**

**FOR**

**VITA**

HELP PREPARE TAXES

**MAKE A DIFFERENCE**

YOU CAN RAISE A LOW-WAGE WORKER'S INCOME BY \$6,000

## WHY VOLUNTEER?

- Help low-wage workers where they live
- Receive IRS VITA training
- Get Community Service hours
- Work on Individual Taxpayer Identification Numbers (ITIN) and immigrant taxpayer issues

## WHERE/WHEN?

Ceiba prepares taxes Monday-Saturday until April 15th at its offices at 174 Diamond Street Philadelphia, PA 19122 (Convenient to public transportation)

## INTERESTED?

Email Ceiba at [info@ceibaphiladelphia.org](mailto:info@ceibaphiladelphia.org) OR Call (215)-634-7245

# INSTRUCTIONS FOR IRS VITA TAX PREPARER CERTIFICATION

- 1) Download these two pdf documents (also available in hard copy)

**Publication 4012: VITA Volunteer Resource Guide:** <http://www.irs.gov/pub/irs-pdf/p4012.pdf>

This is your resource and reference guide. You will need this to complete the test.

**Publication 6744: Volunteer Assistor's Test/Retest :** <https://www.irs.gov/pub/irs-pdf/f6744.pdf>

This is the test booklet for the 2019-2020 tax season. All volunteers are required to pass the **Volunteer Standards of Conduct Test** and the **Intake/Interview and Quality Review Test**. To prepare taxes, you must pass the **Basic Certification Test** or the **Advanced Certification Test**. You take the test online, but this test booklet gives you the test and retest questions in advance.

- 2) Visit the IRS's Link and Learn website to study the tax preparation lessons.

Study the Basic and/or Advanced materials.

(Or navigate to these lessons from [www.linklearncertification.com](http://www.linklearncertification.com))

- 3) Register for the Practice Lab (A website that lets you practice preparing a return using Tax Slayer software)

Go to <https://vita.taxslayerpro.com/IRSTraining/en/Account/Access> or return to [www.linklearncertification.com](http://www.linklearncertification.com) and click on Practice Lab on the right.)

The **password** for all users is: **TRAINPROWEB** (one word – all caps).

- ☐ Click on 'Create Account.'
- ☐ Enter and confirm your email.
- ☐ Create a user name.
- ☐ Create and confirm a password.
- ☐ Select None for Program Type.
- ☐ Leave blank the Site Identification Number (SIDN).
- ☐ Choose a Security Question for password recovery.

WRITE DOWN YOUR AUTO GENERATED USERNAME and PASSWORD you used to register. If you lose this information, you will not be able to access any returns you prepare in the practice lab.

**PRACTICE LAB USERNAME:** \_\_\_\_\_ **PASSWORD:** \_\_\_\_\_

- 4) Use the practice lab to prepare the returns for Scenarios 7, 8, and 9 on the Basic Certification test OR Scenarios 5, 6, 7, and 8 on the Advance Certification Test.
- 5) Take ONE Certification Test; either Basic or Advanced. Please consider taking the Advanced test.  
Return to [www.linklearncertification.com](http://www.linklearncertification.com) and click on Create Account on the left hand side under Certification Tests. Register as 01-VITA volunteer. WRITE DOWN YOUR LOGIN AND PASSWORD. You will need them to access your volunteer certificates online and to take other VITA trainings.
- 6) When you pass... Congratulations! Send the following documents to Ceiba's Executive Director, Will Gonzalez, Esq, at [info@ceibaphiladelphia.org](mailto:info@ceibaphiladelphia.org)
- ☐ \*\*\*\*Volunteer Agreement (When viewing your test score, click the box on the right side of the screen to 'electronically sign' the agreement. Save it as a pdf and email it to Ceiba's site coordinator.) – *all volunteers*
  - ☐ \*\*\*\*Volunteer Standards of Conduct Certificate – *all volunteers*
  - ☐ Intake/Interview and Quality Review Training – *all tax preparers*
  - ☐ Basic Certificate – *or*
  - ☐ Advanced Certificate – *preferred, but not required*
- 7) If you don't pass on the first try, you have another chance to take the test. Review the materials and try again when you are ready. Good luck and thank you for volunteering!

**If you have questions, please contact Ceiba**