



VOLUNTEER WITH CEIBA THIS TAX SEASON!

Ceiba is seeking volunteers to prepare income taxes in Philadelphia's Latino community. Volunteers are needed weekdays and Saturdays from late January through April 2018.

Here's how to get involved:

- 1) **Get certified.** Detailed instructions are on the back of this sheet.
- 2) **Send your certificates and volunteer agreement to info@ceibaphiladelphia.org**
- 3) **Register to select volunteer shifts.** After you send your certificates, look for an email from the Ceiba Volunteer Department via VolunteerSpot. You will receive a link to a VolunteerSpot page to select where and when you want to volunteer at Ceiba's tax locations. Save the link so that you can use it whenever you want to make changes to your volunteer schedule.

If you have questions, please contact Ceiba

Diego Tapia, Taylor De La Pena, or Will Gonzalez T: (215) 634-7245 F: (215) 634-7265
info@ceibaphiladelphia.org



Ceiba

A coalition of Latino community-based Organizations serving Philadelphia

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 2017-2018 tax season. All volunteers (even those helping with intake or greeting) are required to pass the **Volunteer Standards of Conduct Test**. To prepare taxes, you must pass the **Basic Certification Test**. Volunteers are encouraged but not required to also take the **Advanced Certification Test**. You will take the test online, but this test booklet gives you the test and retest questions in advance. **The online version gives the answer choices in a different order, so do not copy your answers directly from the test booklet.** However, entering your answers in the online test will be much easier if you complete the paper version first.

INSTRUCTIONS FOR IRS VITA TAX PREPARER CERTIFICATION

- 1) See step 1 in previous page
- 2) Visit the IRS's Link and Learn website to study the tax preparation lessons
<http://apps.irs.gov/app/vita/> (Or navigate to these lessons from www.linklearncertification.com)
Study the Basic and/or Advanced materials. If you are a new preparer, you will need several hours to read/study the materials.
- 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 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. Use INTERNET EXPLORER.

PRACTICE LAB USERNAME: _____ **PASSWORD:** _____

- 4) Use the practice lab to prepare the returns for Scenarios 7, 8, and 9 on the Basic Certification test and Scenarios 5, 6, 7, and 8 on the Advance Certification Test.

Note: When using the Link and Learn Taxes Practice Lab, complete the client's social security numbers and employer identification numbers by replacing the Xs with your Practice Lab User ID. Use INTERNET EXPLORER.

- 5) Take One Certification Test; either Basic or Advance. Please consider taking the Advance test.

Return to 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.

LINK AND LEARN LOGIN NAME: _____ **PASSWORD:** _____

- 6) When you pass... Congratulations! Send the following documents to Ceiba's site coordinator, Diego Tapia, at info@ceibaphiladelphia.org or by fax to (215) 634-7265.

- ****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!

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