

# VITA Training Steps

Beginning December 2019



## **Step 1 - Create/Update Your Profile**

- Sign up or log in to [CERVIS](#) and update or create your volunteer profile.
- Please upload a photo if possible.

## **Step 2 - Register for Tax Law Training and Practice Tax Lab**

**\*\*NOTE: A Tax Lab is mandatory for all first-time volunteers.\*\***

- **Self StudySession** - View the VITA Training Videos and Practice software Tax Slayer hosted on the tax tools [page](#), to prepare for Basic IRS Certification.
- **In-person Training Session** - Choose one of our in-person sessions and register for an 8-hour session in [CERVIS](#).
- **In-person Practice Tax Lab** - Sign up for a 4 hour, in-person tax lab in [CERVIS](#)

## **Step 3 - Attend Tax Law Training**

- **Self StudySession** - Complete the online training [here](#).
- **In-person Training Session** - Attend the training you registered for in [CERVIS](#).

## **Step 4 - Take the Certification Test**

**\*\*NOTE: All volunteers will need to complete the Standard of Conduct, Intake and Interview exams before taking a basic or advanced certification\*\***

- **Use the IRS Link and Learn Software:**
  - Click [here](#) to create a login to the IRS LINK & Learn. Here you will connect with Online Exams and Certifications.
  - You have a choice to certify at IRS basic or advanced levels.
  - You will need access to the TaxSlayer Software for some exam questions
  - Follow the link [here](#) to practice and use the password **TRAINPROWEB**
  - Once logged in, create your own username and log in to proceed with practice.

## **Step 5 - Attend an In-Person Practice Lab**

**\*\*NOTE: IRS Link and Learn only allows two attempts at testing. Volunteers must pass exams with 80% or better.\*\***

- **Struggling with the test?** Attend a tax lab and get your questions answered!
- All volunteers have the option to attend a 4 hour, in-person lab to get hands-on experience with the software before stepping into a tax site.

## **Step 6 - Email Us Your Certifications**

- Download your 13615 IRS Volunteer Agreement Form from Link and Learn.
- All completed [documents](#) should be emailed to [volunteer@accountingaidsociety.org](mailto:volunteer@accountingaidsociety.org).

## **Step 7 - Sign Up for Shifts and Volunteer**

- Thank you for completing the training.
- Once we have processed your certifications you will be able to sign up for shifts in [CERVIS](#)