

## Welcome to Tax-Aide Self-Study

The AARP Foundation Tax-Aide Self-Study Program provides AARP Tax-Aide Volunteers an opportunity to train on tax law and the tax software outside of the traditional classroom. Special attention is for those who are new Tax-Aide volunteers. For 2018 returning volunteers and those that desire more in depth learning of advanced AARP Foundation Tax-Aide in scope situations can explore a new module of comprehensive lessons.

Traditional training consists of classroom instruction on tax law, tax preparation software, and other topics. Some Instructors and volunteers may find the self-study approach an attractive option because:

- Self-study may supplement the classroom experience. For example, it may help a student catch up when they miss a class.
- Self-study can replace the classroom experience. Recognizing that the classroom schedule may not work for some, a student with a strong commitment to study can learn with assistance of a coach or an Instructor.
- Self-study also works as a self-directed curriculum for a small group of two or three students. For example, this may be helpful in rural or small communities.

The Tax-Aide local and district leadership should review and adjust the syllabus for their specific training needs and may wish to mix or complement self-study with other learning activities.

Self-Study, Tax preparation, and the IRS Certification test are “Open Book” for AARP Foundation Tax-Aide Counselors. For Self-Study, the key learning resources include:



[IRS VITA/TCE Training Guide](#) ... lessons, examples, and exercises published by the IRS for volunteer tax preparers. The

NTTC updates the IRS version with Tax-Aide specific information each year. It can be found on **Volunteer Portal>Libraries>NTTC Modified Pub 4491**.



[IRS Volunteer Resource Guide](#) ... the primary resource for Counselors and the starting point for each lesson. The NTTC

updates the IRS version with Tax-Aide specific information each year. It can be found on **Volunteer Portal>Libraries>NTTC Modified Pub 4012**.

### Practice Lab

The **TaxSlayer Practice Lab** is the software training application provided by the IRS. TaxSlayer Online is the production software provided by the IRS for tax preparation. Generally, this is referred to as TaxSlayer. The exercises in the Self-Study lessons are adapted from the 2018 NTTC Workbook Exercises that are available on the Volunteer Portal>Libraries.

### Learning Review

Lessons have questions to provide a self-evaluation of the learner's comprehension of the tax law and application in creating tax returns for e-filing with the IRS.

- **Other [IRS.gov](#) links and resources.** The **Volunteer Resource Guide** and the **VITA/TCE Training Guide** are important resources for volunteer tax preparers. The following other resources are also useful:
  - [Publication 17](#) - Your Federal Income Tax (For Individuals)
  - [Form 6744](#) VITA/TCE Volunteer Assistor's Test/Retest
  - [IRS' Link & Learn Central](#) – a starting web page with links to Certification Tests, Link & Learn Taxes Lessons and Skills Workout, Volunteer Standards of Conduct Training, Intake/Interview and Quality Review Training

### Support and Supervision

Self-study students work best with the support of a coach, Instructor, Local Coordinator or other experienced Counselor. The coach can answer questions and support the student through the learning process. Self-study students accomplish the same learning objectives, test, and certification requirements as other volunteers, except self-study replaces much of the “classroom” time. All volunteers must pass the IRS Volunteer Standards of Conduct, Intake/Quality Review and Advanced Certification Tests. Self-study students are encouraged to take all tests online.

### There is no one-size-fits-all for learning tax preparation and tax law

Self-starting volunteers may be very satisfied with self-study if they have strong software user and analytical applications skills. The local Tax-Aide organization should share the Instructor-led classroom learning materials available on the Volunteer Portal>Libraries and their existing knowledge and experience with self-study learners.

#### **Feedback:**

Please email: [selfstudy@aarpfdntaxaide.org](mailto:selfstudy@aarpfdntaxaide.org). Appreciate suggestions and comments.