

If you are new to AARP Foundation Tax-Aide, thank you starting this training program. This can lead to a rewarding experience as volunteer tax preparer. The training material will introduce you to the major components of the return preparation process for Volunteer Income Tax Assistance and Tax Counseling for the Elderly (VITA/TCE).

Learning Objectives

Describe:

- The certification processes including the IRS' Standards of Conduct, Intake, Interview, and Quality Review, and Advanced certification tests.
- Responsibilities of an AARP Foundation Tax-Aide volunteer
- Critical components involved in the return preparation process
- Resources available to assist you
- The procedures for helping a taxpayer with identity theft

Note: this document includes links to most of the referenced resources and sites – simply click on the link for access.

Tax-Aide Recommendation:

- Download from **AARP Portal Library>Tax Law and Training>2018 NTTC Self-Study Training:**

- **NTTC Modified Pub 4012**
- **NTTC Modified Pub 4491**

Save these documents to your computer and use Adobe Reader to view them. Searching on key words may save you time (CNTL-F).

Hint:

- The Pub 4012 is an “open book” resource and is your primary guide in the Self-Study Syllabus and when preparing tax returns at a site. ***Learn how to use it!***

Getting Started:



Read **VITA/TCE Training Guide** Part 1-1 Course Introduction.

- All AARP Tax-Aide Counselors certify to the IRS Advanced level.
- Volunteer tax preparers train to assist in filing Form 1040 and certain schedules and forms. By staying within the scope of tax law as outlined in the AARP Tax-Aide Scope Manual, we meet the IRS and AARP Foundation Tax-Aide requirements and fall under the protection of the Volunteers Protection Act. Volunteers must prepare returns only within the Tax-Aide scope for which they have trained and certified.



Open the **Volunteer Resource Guide**.

Read pages 4 – 11 – (ignore pages 5 through 7 – this guidance is for IRS VITA volunteers and can be misleading for AARP Tax-Aide Counselors)

Initial Note on Tax-Aide Scope vs. IRS VITA/TCE Scope:

- It is imperative that AARP Tax-Aide volunteers follow the **AARP Tax-Aide Scope Manual**. There are exceptions to **Pub 4012, pages 5 through 7, Scope of Service and other areas in Pub 4012** and throughout **Pub 4491**. Tax-Aide volunteers should follow the specific scope guidance in the **AARP Tax-Aide Scope Manual**.
- The in-depth discussion of the IRS Forms used by Tax-Aide Volunteers are covered in more depth in the Module C Lesson, AARP Tax-Aide Scope.

Practice Lab

Log into Practice Lab for the first time by following instruction on the next page or by viewing the **TaxSlayer Practice Lab Demo – selfstudy.pdf**

TaxSlayer Practice Lab

Look at this demo if you wish:



[TaxSlayer Practice Lab Demo.pdf](#)

Link to Practice Lab:

<https://vita.taxslayerpro.com/>

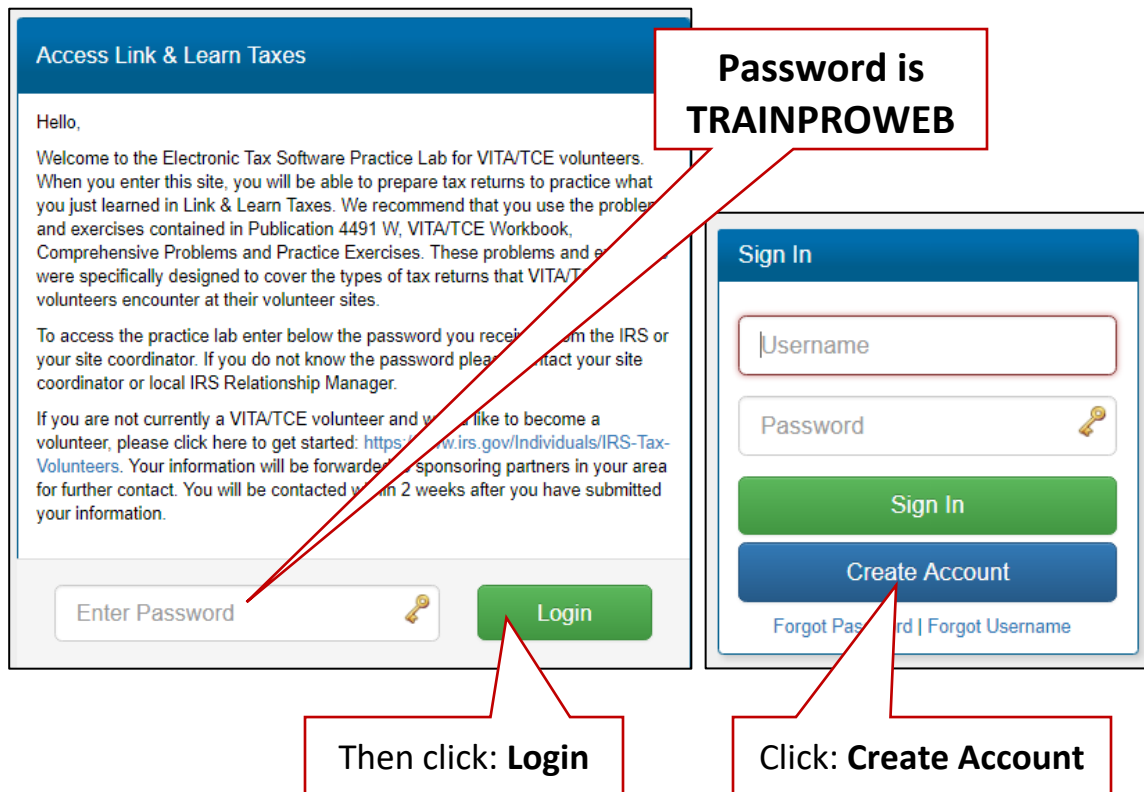
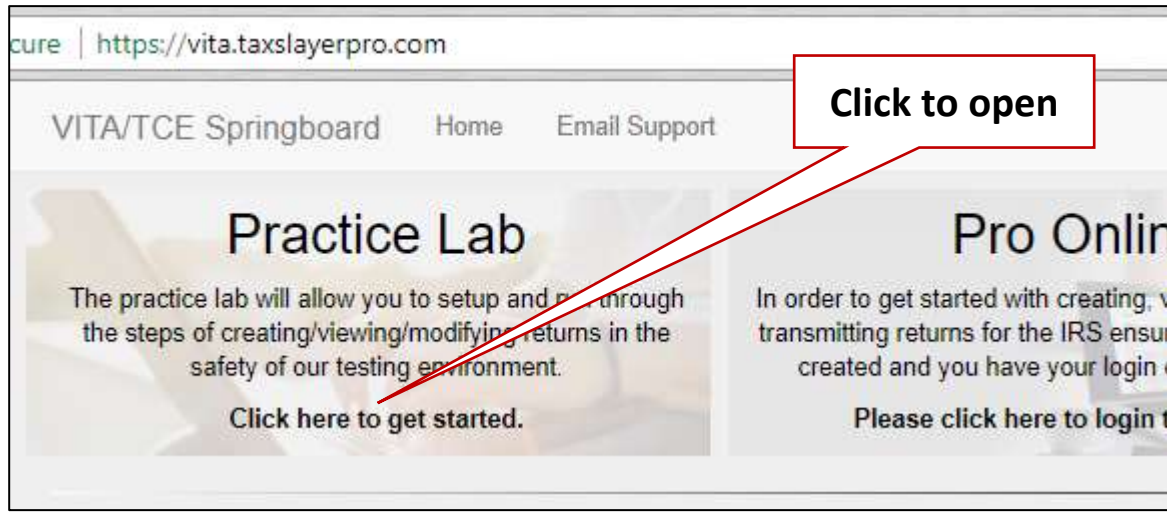
The universal password for volunteers: **TRAINPROWEB**

Look for “AARP Tax-Aide” in dropdown box for Program Type.

*During training, TaxSlayer refers to **Practice Lab**.*

Logging onto Practice Lab the First Time

In your Browser: <https://vita.taxslayerpro.com>



Logging onto Practice Lab the First Time

Create New Account

Account Information

Required:

Email Address

Email Address

Confirm Email Address

Confirm Email Address

Username

Username

Select Username and "write it down"
Password should have no spaces

Password

Password

Confirm Password

Confirm Password

Program Type

Please Select

Click on dropdown and select **AARP Tax-Aide**

Site Identification Number (SIDN)

Site Identification Number (SIDN)

Ignore (not required)

Password Recovery

Security Question

Please Select a Question

Complete and save


Security Answer

Security Answer

Create Account

Then Login to Practice Lab.

View for more detail (included in the Self-Study ZIP folder):

 TaxSlayer Practice Lab Demo.pdf