AARP Tax-Aide
District 18 Training Information for 2014

November 22, 2013

To: District 18 Tax-Aide Volunteers
From: Tom LaJeunesse, Training Coordinator

Bob Fox has been the Training Coordinator for our district for several years. Bob is stepping down from the TC role, and I have taken over for him. We all owe Bob much thanks for his excellent training leadership. For those who don't know me, this is my fifth year as a Tax-Aide or VITA volunteer and I've been the Louisville Local Coordinator for the past two years.

I want to thank all returning Tax-Aide volunteers and welcome the new volunteers who will be with us for the first time this year. Your service is greatly appreciated by our clients and your fellow volunteers.

This letter provides information on what will be required for you to become a Tax-Aide volunteer for the upcoming tax season.

Training and Reference Materials

You should be receiving in the mail hard copies of these Tax Year 2013 documents:

- Publication 4491 Training Guide
- Publication 4012 Volunteer Resource Guide
- Publication 4491W Problems and Exercises
- Form 6744 Volunteer Assistor's Test/Retest

If you have not received any of these documents please contact your Local Coordinator immediately. We encourage you to read these publications prior to the training classes. They will be used heavily during training, so your familiarity with the organization and content will be very helpful to you.

Sometime in January 2014 you will also receive:

- Publication 4491x Changes to the Training Guide for 2013
- Publication 17 Your Federal Income Tax

All of these publications are also available online at www.irs.gov. Another very helpful source of information is the district website, http://tax-aide-bco.wikispaces.com/. This site contains lots of useful information about Tax-Aide, helpful hints about tax preparation, and general information about our district.

TaxWise Online

All District 18 sites will be using TaxWise Online (TWO), replacing the desktop version of our tax preparation software. You will receive instructions from your Local Coordinator on where and how to login to TWO and how to enter social security numbers. You can access TWO on any computer that has internet connection and uses Internet Explorer as the browser. You can't use other browsers like Firefox or Chrome on your PC. People with a Mac would need to run Windows and Internet Explorer to access TWO.

There are small differences in navigating around the software between TWO and desktop. We encourage Counselors to get familiar with TWO by checking out the TWO website at the address provided by your Local Coordinator. We will conduct a short session at the training classes to introduce TWO and the district website.

Training Classes

As in previous years, we will conduct two training sessions, both held at the Cornerstone Church, located at 1190 South Lashley Lane, Boulder. A map and directions are at www.cornerstoneboulder.org.

Introductory Tax-Aide Training is the first training session. Attendance is required for all new Tax-Aide Counselors, and those who have had a break of one or more years in volunteering. All district volunteers are welcome to attend this session but it is not required for returning Counselors. The purpose of this session is to introduce the TaxAide process and the basics of the TaxWise software. Minimal tax law information is covered. This session will be held January 9, 2014, 8:30am to 4:30pm.

Certification Tax-Aide Training is the second training session. It is intended for all Tax-Aide Counselors to get in-depth training in the Tax-Aide process, applicable tax laws, and changes specific to this year. Attendance at Certification Training is not mandatory for volunteers with (1) five years or more of continuous prior service, and (2) prior approval from their Local Coordinator. Counselors who do not attend Certification Training will have added qualification requirements as described later in this letter. Client Facilitators (aka Greeters) need to attend only the first half day of Certification Training to get a Tax-Aide overview. This session will be held January 20-23, 2014, 8:30am to 4:30pm.

There will be significant changes to the format for the Certification Training compared to previous years:

- We will conduct training to teach tax law and TaxWise implementation in a format that closely resembles the end-to-end process Counselors use to prepare actual tax returns at their Tax-Aide sites.
- We will spend the majority of training time with instructors leading Counselors to prepare five tax returns on their computers. These returns will be based on exercises in the 4491W that are modified to cover not only the given scenarios but also difficult topics encountered by our volunteers as they prepared returns at our sites in prior years.

- Integral with preparing these returns, we will repeatedly direct Counselors to relevant pages in the reference documents, primarily the 4012 and Pub 17 and the district website. A fundamental goal will be to show Counselors where to find answers to questions about tax law and TaxWise implementation that will come up at our tax preparation sites.
- Instructors will go at a pace that allows Counselors to consult the reference documents and prepare TaxWise returns with no one lagging behind.

Certification

Volunteer certification is required by the IRS and the AARP Foundation. Volunteers will be certified with the same process used in the past, with some changes from the IRS for TY2013. To be certified, volunteers must pass the appropriate tests found in Form 6744. Although paper copies of the certification tests are available in Form 6744, all Counselors are strongly encouraged to use the Link and Learn online system (https://linklearncertification.com/) for certification.

Here is a summary of the certification process on the Link and Learn website:

1. **Volunteer Standards of Conduct (VSOC)** - All volunteers (including Greeters) must be trained and certified in VSOC by reading the material and passing the VSOC test.
2. **Intake/Interview and Quality Review Training** - After completing the VSOC training and test, all Counselors who will be preparing tax returns must take the Intake/Interview and Quality Review Training course. This consists of reading Power Point slides.
3. **Advanced Certification Test** - In previous years, there were three certification tests (Basic, Intermediate, Advanced). This year, there is no Intermediate level. Basic and Advanced are two separate stand-alone courses with approximately 30-40 questions each. All Counselors preparing tax returns in District 18 must pass the Advanced Certification Test. You do not have to take the Basic test because the Advanced test also covers the Basic information. A minimum score of 80% is required to pass. You are allowed two attempts to pass. All tests are open book; you should not work with anyone else when taking the tests.
4. **Optional Certifications** - After passing the Advanced Certification Test, Counselors may take the optional Health Savings Account training and test to allow them to prepare the HSA portion of a tax return. There are other optional training and tests we do not do: Military, International, Cancellation of Debt, Foreign Student, and Puerto Rico.
5. **Volunteer Standards of Conduct Agreement** - After completing the three (or four) steps above, volunteers sign Form 13615, the Volunteer Standards of Conduct Agreement that documents your successful certification, and submit it to your Local Coordinator.

The deadline for Certification will be the end of day, Friday January 24, 2014. All Instructors should be certified by December 30, 2013.

Qualification

A second requirement for Counselors beyond certification is qualification, which consists of completing a number of tax returns that are based on specified scenarios from the 4491W document. You will prepare these returns with TaxWise Online, and again you can use any computer with internet access and the Internet Explorer browser. You must use the 2013 version of TWO, expected to be released around November 25, 2013, to get the right answers.

Counselors who attend the Certification Training session and complete the five training exercises in class will be required to complete one more qualification exercise on their own (not during a training session) – the Austin exercise from the 4491W.

Experienced Counselors who do not attend the Certification training session must complete five qualification exercises on their own. The five exercises consist of these 4491W scenarios (without the training class modifications): Graham, Austin, Fleming, Sterling, and Kent.

Counselors should prepare the qualification returns with the same quality as if the returns were to be e-filed. Your Local Coordinator will give you instructions on how to submit your returns for review when they are completed. Reviewers will go over qualification returns to confirm that each Counselor understands the tax laws and TaxWise implementation applicable to each scenario. Reviewers will give feedback to Counselors on each submitted return.

We recommend that Counselors complete qualification exercises as much as possible prior to the start of Certification training. We will provide answers for the qualification exercises sometime before the first day of training. Questions may be brought up and discussed at training if there are issues. The deadline for qualification will be the end of day, Saturday January 25, 2014.

If you have any questions about anything in this letter, contact me or your Local Coordinator. I look forward to seeing all of you at our interesting and productive training sessions.