

IRS Certification Overview

Overview

Each Tax-Aide volunteer must meet the annual training and certification requirements of the IRS as listed in IRS Form 13615. Each State Coordinator will establish a process that ensures the recording of volunteer certifications is completed using the tools provided by the National Office. The process must include the designation of one or more specific Volunteer Leaders to record the certification levels of all volunteers and the appointment of a member of the SMT to oversee the process and to ensure that reporting is complete and deadlines are met.

Topics:

- Documenting Volunteer Certification

Documenting Volunteer Certification

Volunteers are recognized as certified once their assignment examination requirements are met. Requirements can range from passing the **Standards of Conduct** test and receiving Tax-Aide Policies and Procedures training to passing examinations on tax law. Volunteer certification must be documented in the Portal by volunteer leaders so that the information can be transmitted to the IRS. The certifications for each volunteer are logged in the Portal and are due by the third business day of February. Certifications must be updated if changes occur between the February due date and April 1 when the records are locked.