

IRS Certifications

- Policies
- Requirements
 - including **new** LMS e-Courses/Quizzes
- Process
- Timeline
- Cleanup Activities
- Portal Entry

- Typically the AC (and/or other volunteer(s) as designated) for each district is/are responsible for entering and finalizing the certification requirements in the portal
- The ADS is responsible for monitoring the process
- The certification report on the portal is the official - and only - method for notifying the IRS that a volunteer has certified
- The signed 13615 Volunteer Agreement DOES NOT serve as a volunteer's certification

Volunteers who were not certified have worked at sites in Arizona!

- Some were never registered on the portal
- Some were listed as Prospective Volunteers and never given an assignment
- Some were registered as their spouse

Because they were not certified:

- They were NOT covered by the volunteer Protection Act
- They were NOT allowed reimbursement
- They did NOT accumulated service award time
- An issue would have arisen if the site was visited by the IRS

National has made their position clear

Until a volunteer is registered on the portal in their name:

- NO training materials should be distributed
- NO attendance at training session is allowed

- A document on the AARP Tax-Aide website contains detailed instructions on how an interested volunteer can register to be on the portal
- AARP Member Services is appropriate place to go to solve issues encountered with this process
1-866-839-0463
Monday thru Friday from 7 a.m. - 11 p.m. E.T.
- OneSupport ticket agents cannot help – they refer you to Member Services
- ADS is also a good help source

The IRS requires that the identity of all volunteers is validated with a government-issued photo ID

TWO NEW REQUIREMENTS

1. The volunteer's name on the 13615 must match their ID
2. The volunteer's "Preparer Name" in TaxSlayer must match their ID

No shortened or "nicknames" allowed

Certification Policies

New volunteers should be instructed to use their legal ID name when registering for Link and Learn

If account already exists, volunteers should be instructed to go to the “My Account” tab where they can check and edit name as necessary



* First Name:	<input type="text"/>
* Last Name:	<input type="text"/>
SEID:	<input type="text"/>

Software Administrator must be provided list of volunteer's names as shown on ID for possible editing in TSO

To edit Preparer's Name in TSO:

1 - Select "Configuration"



The screenshot shows a horizontal menu bar with a white background and a thin black border. On the left side, the word "Configuration" is displayed in a bold, dark grey font. Below it, in a smaller, lighter grey font, is the text "Setup the configuration options for your office." On the right side of the menu bar, there is a grey rectangular button with the word "Select" written in white text.

2 – Select “Preparer Setup”

Preparer Setup
Enter and edit Preparer Information.

Select

3 – Select “Edit” next to Preparer’s Name

SSN ↑↓	PTIN ↑↓	Preparer Name	Email	Active ↑↓	
S60050902		ALICIA GUTZMAN	renegade@theriver.com	<input checked="" type="checkbox"/>	Edit

4 – Edit name as needed to match ID

Preparer(s) Setup Menu

Preparer Personal Information

First Name

Middle Initial

Last Name

5 – Select  to save

- A decision is pending by National whether volunteer's name in portal will also have to match ID
- **NEVER** edit name in portal contact record – even though it is physically possible – doing so will cause an error
- In the event it becomes a requirement, detailed instructions will be provided

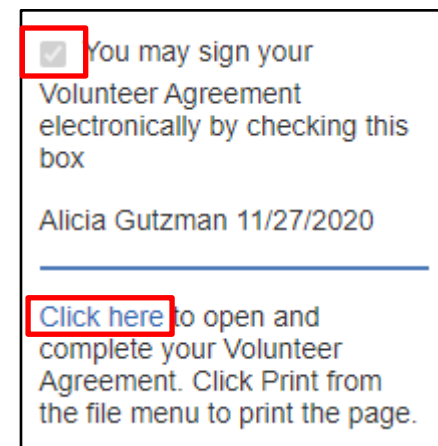
- The 13615 must be signed and dated by an Approving Official who has already been certified
 - TRS signs for DCs, ACs, and Instructors
 - DCs or Instructors sign for LCs
 - DCs, Instructors or LCs sign for other volunteers

Prior to conducting volunteer training, instructors should complete and pass on Link and Learn:

- Volunteer Standards of Conduct Test
- Intake/Interview and Quality Review Training and Test
- Advanced Test

Certification Policies

- Electronically sign your 13615 in L&L by checking the box
- Select “Click here” to download .pdf file
- Attach it to an e-mail to AI with “13615” in subject line
aztaxal@gmail.com
- After signed and dated will be returned by e-mail
- The signed 13615 agreements must be retained by the District for reference until the end of calendar year



- We often use the word “Greeter” for certain volunteers at our sites
- The official Tax-Aide assignment is “Support Facilitator”
- SFs are useful for tasks that do not require the handling of taxpayer documents
- Train and certify as a “Client Facilitator” all volunteers who will be handling or scanning taxpayer documents

The Policies and Procedures Manual outlines what certifications are required by assignment

Reminder:

Notify ADS to add, update and/or change assignments in portal

Certification Requirements

- A new “Minimum Certification Requirements by Position” chart available when completed
- Library > Tax-Aide Volunteer Portal – New > VP05

D R A F T

Minimum Certification Requirements by Position									
Role	01_IRS Employee	02_Volunteer Standards of Conduct Test	03_Policy and Procedures Training	04_Intake/Interview and Quality Review Training and Test	05_Proficiency Problems	06_Advanced Test includes HSA TY2020	07_Required Coordinator Training	Required IRS Site Coordinator Training New TY2020	08_State Training*
Client Facilitator (CF)		Y	Y	Y					
Local Coordinator (LC)		Y	Y	Y			Y	Y	
Shift Coordinator (SCO)		Y	Y	Y			Y	Y	
Counselor (COU)		Y	Y	Y	Y	Y			AR
Instructor (INS)		Y	Y	Y	Y	Y			AR
Training Coordinator (TRC)		Y	Y	Y	Y	Y			AR
Training Specialist (TRS)		Y	Y	Y	Y	Y			AR
Electronic Return Originator (ERO)		Y	Y	Y	Y	Y			AR
Support Facilitator (SF)		Y	Y						
Technology Coordinator (TC)		Y	Y						
Communications Coordinator (CC)		Y	Y						
Administration Coordinator (AC)		Y	Y						
District Coordinator (DC)		Y	Y						
Administration Specialist (ADS)		Y	Y						
Assistant State Coordinator (ASC)		Y	Y						
Technology Specialist (TCS)		Y	Y						
Prospective Volunteer Specialist (PVS)		Y	Y						
Partnership & Communications Specialist (PCS)		Y	Y						
State Coordinator (SC)		Y	Y						
Regional Coordinator (RC)		Y	Y						
Regional Administration Advisor (RAA)		Y	Y						
Regional Technology Advisor (RTA)		Y	Y						
Regional Training Advisor (RRA)		Y	Y	Y	Y	Y			AR

02. Volunteer Standards of Conduct Test

Who: All Volunteers

Where: Link & Learn

Certification
01. IRS Employee
02. Volunteer Standards of Conduct Test
03. Policy and Procedures Training
04. Intake/Interview and Quality Review Training and Test
05. Site Coordinator Training
06. Site Coordinator Test
07. Proficiency Problems
08. Advanced Test
09. Qualified Experienced Volunteer
10. Military
11. Foreign Student
12. International
13. Puerto Rico 1
14. Puerto Rico 2
15. Volunteer Applying for CE Credits
16. State Training

03. Policy & Procedures Training

(New – not required to present at training)

Who: All Volunteers

Where: **LMS** (Training Tab on Portal)

Certification
01. IRS Employee
02. Volunteer Standards of Conduct Test
03. Policy and Procedures Training
04. Intake/Interview and Quality Review Training and Test
05. Site Coordinator Training
06. Site Coordinator Test
07. Proficiency Problems
08. Advanced Test
09. Qualified Experienced Volunteer
10. Military
11. Foreign Student
12. International
13. Puerto Rico 1
14. Puerto Rico 2
15. Volunteer Applying for CE Credits
16. State Training

04. Intake/Interview and Quality Review Training and Test

Who: Client Facilitators
Local Coordinators
Shift Coordinators
Counselors
Instructors
Training Coordinators
Training Specialists
EROs

Where: Link & Learn

Certification
01. IRS Employee
02. Volunteer Standards of Conduct Test
03. Policy and Procedures Training
04. Intake/Interview and Quality Review Training and Test
05. Site Coordinator Training
06. Site Coordinator Test
07. Proficiency Problems
08. Advanced Test
09. Qualified Experienced Volunteer
10. Military
11. Foreign Student
12. International
13. Puerto Rico 1
14. Puerto Rico 2
15. Volunteer Applying for CE Credits
16. State Training

Certification Requirements

05. Site Coordinator Training and 06. Site Coordinator Test

Who: Local Coordinators
Shift Coordinators

Where: **LMS** (Training Tab
on Portal)

Can retake on L&L if necessary

Does NOT qualify for Continuing
Education Credits

Certification
01. IRS Employee
02. Volunteer Standards of Conduct Test
03. Policy and Procedures Training
04. Intake/Interview and Quality Review Training and Test
05. Site Coordinator Training
06. Site Coordinator Test
07. Proficiency Problems
08. Advanced Test
09. Qualified Experienced Volunteer
10. Military
11. Foreign Student
12. International
13. Puerto Rico 1
14. Puerto Rico 2
15. Volunteer Applying for CE Credits
16. State Training

Certification Requirements

Under the “My Account” tab in Link & Learn



Choose “No” for the following question:

* Do you want to take the Site Coordinator certification? Yes No

Change to “Yes” to retake if necessary

Certification Requirements

07. Proficiency Problems

Who: Counselors
Instructors
Training Coordinators
Training Specialists
EROs

Where:

NTTC Workbook

Core: Anderson, Emerson, King

Comprehensive: Parsons

Coronavirus Workbook

Exercises Rel 2

Garcia and Polite

Certification
01. IRS Employee
02. Volunteer Standards of Conduct Test
03. Policy and Procedures Training
04. Intake/Interview and Quality Review Training and Test
05. Site Coordinator Training
06. Site Coordinator Test
07. Proficiency Problems
08. Advanced Test
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10. Military
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13. Puerto Rico 1
14. Puerto Rico 2
15. Volunteer Applying for CE Credits
16. State Training

08. Advanced Test

(NEW - includes **HSA**
no separate test)

Who: Counselors

Instructors

Training Coordinators

Training Specialists

EROs

Where: Link & Learn

Certification
01. IRS Employee
02. Volunteer Standards of Conduct Test
03. Policy and Procedures Training
04. Intake/Interview and Quality Review Training and Test
05. Site Coordinator Training
06. Site Coordinator Test
07. Proficiency Problems
08. Advanced Test
09. Qualified Experienced Volunteer
10. Military
11. Foreign Student
12. International
13. Puerto Rico 1
14. Puerto Rico 2
15. Volunteer Applying for CE Credits
16. State Training

New Optional Certification

09. Qualified Experienced Volunteer (QEV)

- Contains very advanced material
- **NOT** replacement for Advanced Test
- Does NOT qualify for Continuing Education Credits

Where: Link & Learn

Certification
01. IRS Employee
02. Volunteer Standards of Conduct Test
03. Policy and Procedures Training
04. Intake/Interview and Quality Review Training and Test
05. Site Coordinator Training
06. Site Coordinator Test
07. Proficiency Problems
08. Advanced Test
09. Qualified Experienced Volunteer
10. Military
11. Foreign Student
12. International
13. Puerto Rico 1
14. Puerto Rico 2
15. Volunteer Applying for CE Credits
16. State Training

Optional Certification

10. Military

Volunteers must be certified in order to prepare or quality review returns requiring this optional training and test

Where: Link & Learn

Certification
01. IRS Employee
02. Volunteer Standards of Conduct Test
03. Policy and Procedures Training
04. Intake/Interview and Quality Review Training and Test
05. Site Coordinator Training
06. Site Coordinator Test
07. Proficiency Problems
08. Advanced Test
09. Qualified Experienced Volunteer
10. Military
11. Foreign Student
12. International
13. Puerto Rico 1
14. Puerto Rico 2
15. Volunteer Applying for CE Credits
16. State Training

16. State Training

Required by all states that prepare state tax returns

Who: Counselors

Instructors

Training Coordinators

Training Specialists

EROs

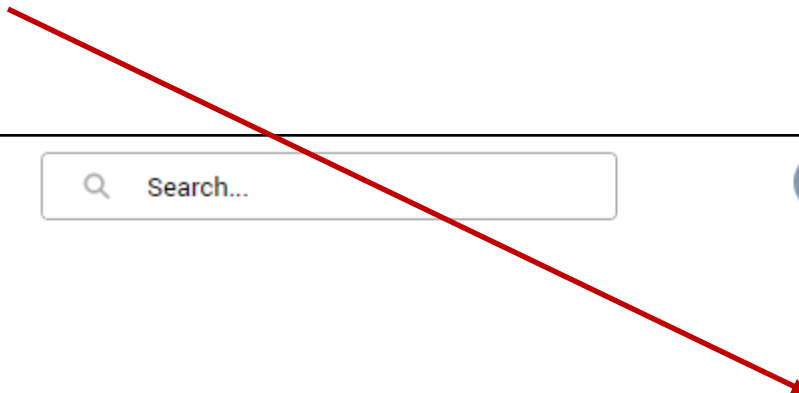
Where: Designed by each state

Certification
01. IRS Employee
02. Volunteer Standards of Conduct Test
03. Policy and Procedures Training
04. Intake/Interview and Quality Review Training and Test
05. Site Coordinator Training
06. Site Coordinator Test
07. Proficiency Problems
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09. Qualified Experienced Volunteer
10. Military
11. Foreign Student
12. International
13. Puerto Rico 1
14. Puerto Rico 2
15. Volunteer Applying for CE Credits
16. State Training

Certification Requirements

NEW Required LMS e-Courses/Quizzes

Located on the “Training” tab in the Portal



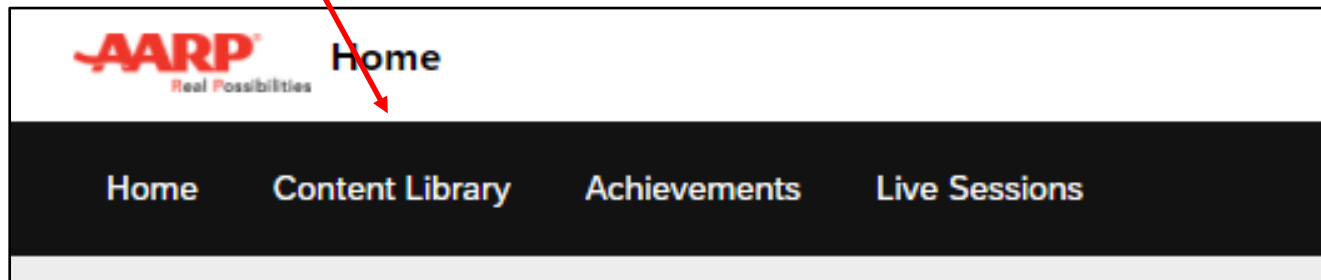
The screenshot shows the top navigation bar of the AARP Tax-Aide portal. On the left, the AARP Foundation logo is above the large text 'TAX-AIDE' and the tagline 'Free tax assistance for those who need it most'. In the center is a search bar with a magnifying glass icon and the text 'Search...'. On the right is a user profile icon with the name 'ALICIA GUTZM...' and a dropdown arrow. Below these elements is a dark red navigation bar with white text for the following tabs: Home (highlighted in yellow), Dashboards, Reports, Contacts, Manage Reimbursements, Orders, Libraries, Training, and More with a dropdown arrow.

Certification Requirements

Still a work in progress

Scheduled for completion in December

Click on “Content Library” tab to view courses available now



Folder in portal library – limited information right now

Certification Requirements

NEW Required LMS e-Courses/Quizzes

Note which positions the courses are designed for, whether or not the training is required, and how often

E-Course Title	Course Description	Positions who should complete e-Course	Is Training Required	Frequency
Introduction to Tax-Aide	This introductory course gives volunteers a deep-dive into the Tax-Aide program; who we are, what we do, how we are funded and who we serve.	Refresher and New Volunteers	No	N/A
Security Essentials	This course educates volunteers on how to maintain technology security compliance, protect taxpayers as well as best practices for device, networking and site security.	All Volunteers	Yes	Annual
Technology & Security	This course educates volunteers on the safety and security of taxpayer accounts and personal information. It also explains Tax-Aide's responsibility as an authorized IRS e-file provider.	All Volunteers	Yes	Annual
Tax-Aide Policy & Procedures	This course gives volunteers a high-level overview of the policy and procedures of the Tax-Aide program.	All Volunteers	Yes	Annual
Tax-Aide Session Management Overview	This course educates volunteers on the different features of Session Management (e.g. appointment scheduler).	Administrators at Tax-Aide sites that use Session Management	No	N/A

Certification Requirements

NEW Required LMS e-Courses/Quizzes Continued . . .

E-Course Title	Course Description	Positions who should complete e-Course	Required Training?	Frequency
Chromebooks	This course educates volunteers on how to use the Chromebook effectively as well as provides helpful tips and resources.	All Volunteers	No	N/A
Local Coordinator Training	This course consists of four modules that educates volunteers on: Introduction and Responsibilities, Quality Site Requirements and Security, Site Set-Up and Site Management and Reporting.	Local Coordinators and Shift Coordinators	Yes	Annual
State Coordinator Training	This course consists of two modules that educates volunteers on: Roles and Responsibilities, Important Meetings, Site Visits, Volunteer Management and Equipment, Security and Incident Reporting.	Refresher and New State Coordinators	No	N/A
Session Management	This course consist of four modules that educates volunteers on the full use of the Session Management tool.	Administrators at Tax-Aide sites that use Session Management	Yes	Annual
Tax Software Configuration Management	This course educates volunteers on managing Site Software Set-Up for the upcoming tax season.	Regional Technology Advisor, Technology Specialist, Technology Coordinator	No	N/A

NEW Required LMS e-Courses/Quizzes

The following required quizzes can be taken as many times as necessary to pass

- Security Essentials
- Technology and Security
- Tax-Aide Policies & Procedures

Local Coordinator Training is limited to 2 tries

- Take on LMS first
- Retake on L&L

NEW Required LMS e-Courses/Quizzes

Prospective Volunteer Access to Training Tab

- Manual process currently
- PV's status must be "Candidate" (Under Consideration)
- Time frame mentioned was "a couple of weeks"
- ADS to submit ticket if "Candidate" isn't allowed access within that period of time after status is updated
- Will be automated process at some point

NEW Required LMS e-Courses/Quizzes

Certification bulk edit on the Portal does not include all of the required LMS e-Courses/Quizzes

Volunteer's certification should not be "finalized" until all LMS requirements have been satisfied

NEW Required LMS e-Courses/Quizzes

Verification options include:

- Volunteer shares e-mail that is automatically sent as each course/quiz is completed
- Volunteer shares “achievement report” created and exported to Excel in the portal
- National plans to develop a report by state

Note 2 NEW List Cards in Contact Record (bottom right)

User Learning Path Results (3)			
Learning Path	Percentage Compl...	Completed	Finish Date
Session Manage...	0.00%	<input type="checkbox"/>	
Tax-Aide Technol...	100.00%	<input checked="" type="checkbox"/>	10/19/2020 6:40 AM
LMS Demo - Tax-...	50.00%	<input type="checkbox"/>	

[View All](#)

User Program Results (6+)			
Course	Percentage Compl...	Completed	Completed date
Introduction to C...	0.00%	<input type="checkbox"/>	
Introduction to Ta...	100.00%	<input checked="" type="checkbox"/>	10/19/2020 6:40 AM
Session Manage...	0.00%	<input type="checkbox"/>	
Session Manage...	0.00%	<input type="checkbox"/>	
Session Manage...	0.00%	<input type="checkbox"/>	
Introduction to Ta...	0.00%	<input type="checkbox"/>	

[View All](#)

- Certifications are due by the first Monday of February each year.
- Update if changes occur between February due date and April 1 when records are locked
- ADS will run an error report and e-mail DC and AC when any incomplete certification entries are found based on volunteer's position

Volunteer Records

All new assignments and/or changes to be done by ADS

- Notify ADS of non-returning active volunteers
 - Volunteer's Name and ID number
 - Assignment Ending Date
 - Reason (Retired, Leave of Absence or Death)
- Notify ADS of new assignments or assignment changes
 - Volunteer's Name and ID number
 - Assignment Starting and/or Ending Date(s)
 - Site location if different from current assignment

Prospective Volunteer Records

- Assignment Status must be reviewed and updated
 - Candidates who did not complete training and will not be certifying must be moved to “On Hold” or “No Match” status as appropriate
 - Can be done at district level or notify ADS (include Volunteer’s Name, ID#, and appropriate status)

PROGRAM ROUTE TO	STATUS ↑	P V C D
TA-R10-AZ1-D01 (5 records)	Under Consideration	
	Under Consideration	
	Under Consideration	
	Under Consideration	
	Under Consideration	

Prospective Volunteers (continued)

- Candidates who completed training and will be certifying must be given an appropriate volunteer assignment by the ADS
- Notify ADS and include Volunteer Name, ID#, assignment(s) and site(s)

Goal: No “Prospect” or “Under Consideration” status in Prospects report

REPORT
AZ1: Prospec

Total Records
85

PROGRAM ROUTE TO	STATUS ↑	P V C D
TA-R10-AZ1-D01 (5 records)	Under Consideration	
	Under Consideration	
	Under Consideration	
	Under Consideration	
	Under Consideration	

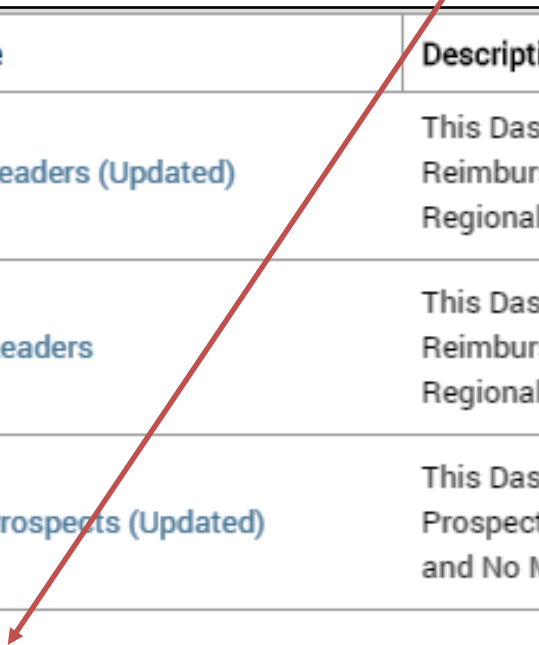
Certification Process

To enter certifications in Portal:

- In top center search box type AZ1 and hit enter
- Click on Dashboards tab

The screenshot shows the top navigation bar of the AARP Foundation Tax-Aide portal. On the left is the logo for "AARP Foundation TAX-AIDE" with the tagline "Free tax assistance for those who need it most". In the center is a search box containing the text "AZ1". On the right is a user profile for "ALICIA GUTZMAN". Below the navigation bar is a red menu bar with the following items: Home, Dashboards (highlighted in yellow), Reports, Contacts, Manage Reimbursements, Orders, Libraries, Training, Volunteer Hours, and More. A vertical yellow button labeled "Need Help?" is on the far right. Two red arrows originate from the text above: one points to the search box containing "AZ1", and the other points to the "Dashboards" tab in the navigation bar.

- Click on TA - R10 - AZ - Certifications (Updated)



Dashboard Name	Description	Folder
TA - R10 - AZ1 - Leaders (Updated)	This Dashboard includes NO information on Reimbursements and is available to Regional Leaders.	Tax-Aide: Leaders
TA - R10 - NV1 - Leaders	This Dashboard includes NO information on Reimbursements and is available to Regional Leaders.	Tax-Aide: Leaders
TA - R10 - AZ1 - Prospects (Updated)	This Dashboard includes a list of ALL Prospective Volunteers in an Active, On Hold and No Match status.	Tax-Aide: Prospects
TA - R10 - AZ1 - Certifications (Updated)		Tax-Aide: Certifications

- Set “Status” drop down to “All” – this will include all returning volunteers and “Candidates”
- Set “District” drop down to your district
- Set “Certification Status” drop down to “All”

The screenshot shows a dashboard titled "Dashboard TA - R10 - AZ1 - Certifications" with a "Refresh" button. Below the title, it says "As of Oct 13, 2019 12:20 PM-Viewing as Robin Murphy". A red box highlights three filter dropdowns: "Status" set to "All", "District" set to "contains D19", and "Certification Status" set to "All".

Below the filters, there are two main sections:

- Tax-Aide Volunteer and Candida...**: A table with columns "Full Name ↑" and "Sum of Compl...". The table lists several names with a value of 0 in the second column.
- Summary of Active and Candid...**: A donut chart titled "Record Count" showing a value of 11. Below the chart, it says "Completed Certification Require..." with a radio button set to "false".

At the bottom of each section, there are links to "View Report" for the respective data.

Certification Process

Some have indicated they prefer to work with a spreadsheet before entering the data into the portal

To create a spreadsheet choose “View Report” in first column

Dashboard
TA - R10 - AZ1 - Certifications
As of Oct 13, 2019 12:20 PM Viewing as Robin Murphy

Status: All | District: contains D19 | Certification Status: All

Full Name ↑	Sum of Compl...
Beverly Welling	0
Dianne Muchow	0
Joanne Parkes	0
Margy Pracchia-Nibl...	0
MARK Niblack	0
Pamela Whitney	0
Paula Stefani	0
Robert W. Dore	0

[View Report \(AZ1: Vol & PV Certification Status\)](#)

Summary of Active and Candida...
Record Count: 11
Completed Certification Require...: false
[View Report \(AZ1: All PVs and Vols Cert \(Pie ...](#)

Certification Process

Report displays with “Subtotal” line under each name
Click on Subtotals to remove

Home Dashboards **Reports** Contacts Manage Reimbursements Orders Libraries Volunteer Hours Program Volunteer Awards More

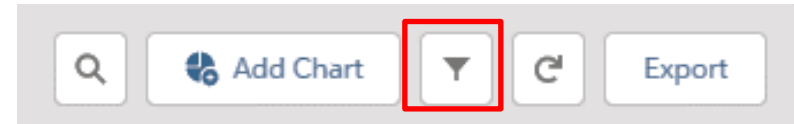
REPORT
AZ1: Vol & PV Certification Status

Total Complete
0

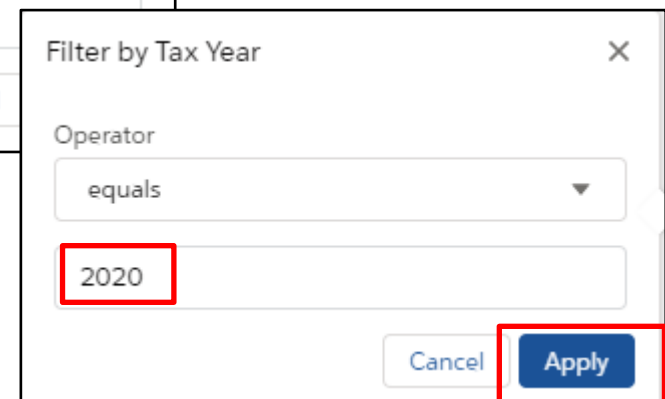
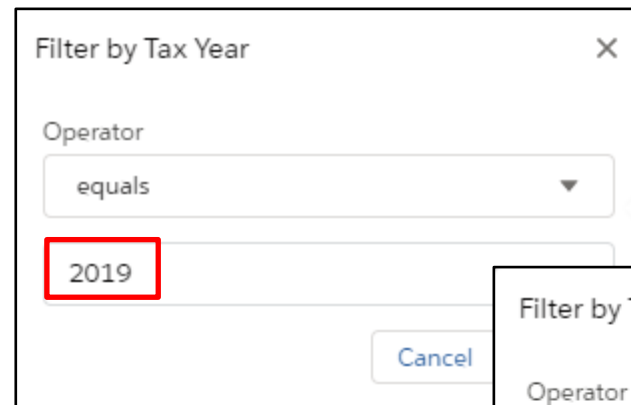
CERTIFICATION: CERTIFICATION		01. IRS EMPLOYEE	02. VOLUNTEER STANDARDS OF CONDUCT TEST	03. POLICY AND PROCEDURES TRAINING	04. INTAKE/INTERVIEW AND QUALITY REVIEW TRAINING AND TEST	05. PROFICIENCY PROBLEMS	06. ADVANCED TEST	07. REQUIRED COORDINATOR TRAINING	08. STATE TRAINING	09. MILITARY	10. INTERNATIONAL	11. HEALTH SAVINGS ACCOUNT
FULL NAME	VOLUNTEER ID	COMPLETE Sum	COMPLETE Sum	COMPLETE Sum	COMPLETE Sum	COMPLETE Sum	COMPLETE Sum	COMPLETE Sum	COMPLETE Sum	COMPLETE Sum	COMPLETE Sum	COMPLETE Sum
Aimee Hodgkin	100525314	0	0	0	0	0	0	0	0	0	0	0
Subtotal		0	0	0	0	0	0	0	0	0	0	0
Alicia Gutzman	040279457	0	0	0	0	0	0	0	0	0	0	0
Subtotal		0	0	0	0	0	0	0	0	0	0	0
Anthony T Wisniewski	500076032	0	0	0	0	0	0	0	0	0	0	0
Subtotal		0	0	0	0	0	0	0	0	0	0	0
Barbara Jensen	500236299	0	0	0	0	0	0	0	0	0	0	0
Subtotal		0	0	0	0	0	0	0	0	0	0	0

Row Counts Detail Rows Subtotals Grand Total Stacked Summaries

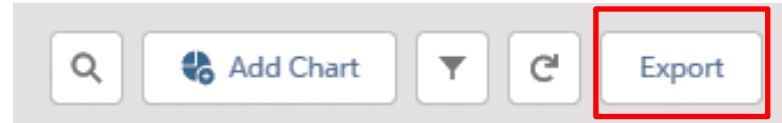
Click on “Filter” icon to check tax year



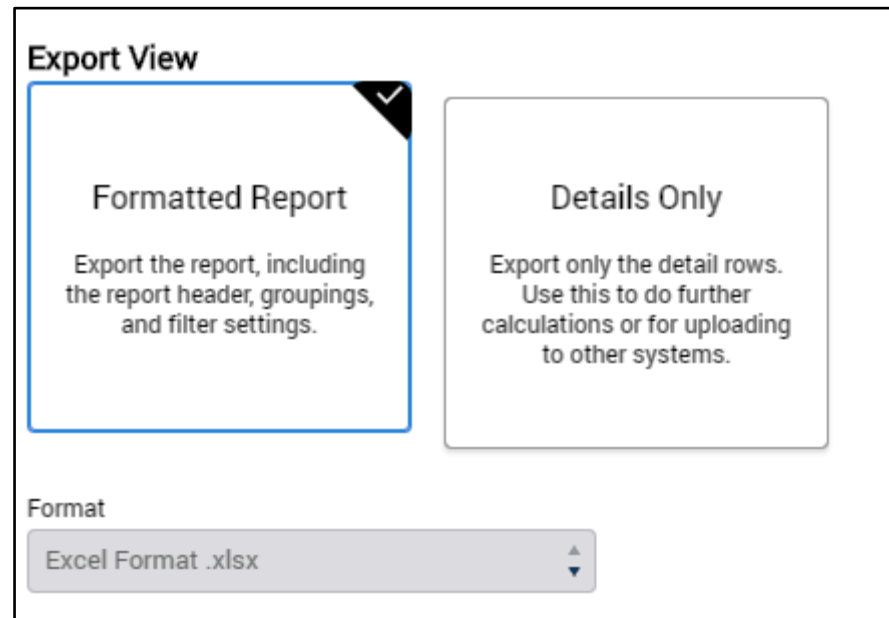
If Tax Year equals 2019 click on “equals 2019”, change to “Filter by Tax Year to “2020”, and click on Apply



Export to Excel



Choose formatted report



Now you have an Excel file that you can use to keep track of certifications that need to be input in the portal

It might be helpful to add columns to indicate volunteer's position(s) and required LMS e-Courses/Quizzes

	Certification: Certification →		01. IRS Employee	02. Volunteer Standards of Conduct Test	03. Policy and Procedures Training	04. Intake/Interview and Quality Review Training and Test
	Full Name ↑	Volunteer ID ↑	Sum of Complete	Sum of Complete	Sum of Complete	Sum of Complete
16	Aimee Hodgin	100525314	0	0	0	0
17	Alicia Gutzman	040279457	0	0	0	0
18	Anthony T Wisniewski	500076032	0	0	0	0
19	Barbara Jensen	500236299	0	0	0	0
20	Barbara R Garcia	040775520	0	0	0	0
21	Bonita J Wolfe	105203670	0	0	0	0
22	Bonnie Burer	100775562	0	0	0	0
23	Bonnie Gordon	100517023	0	0	0	0
24	Bonny Lou Miller	134088084	0	0	0	0
25	Brenda L Stewart	100328622	0	0	0	0

To enter certifications in the portal, click on “View Report” under the Pie Chart

The screenshot shows a dashboard titled "Dashboard TA - R10 - AZ1 - Certifications" with a "Refresh" button. Below the title are filters for "Status" (set to "All"), "District" (set to "contains D19"), and "Certification Status" (set to "All").

There are two main sections:

- Tax-Aide Volunteer and Candida...**: A table with columns "Full Name ↑" and "Sum of Compl...".
- Summary of Active and Candida...**: A pie chart titled "Record Count" showing a value of 11. Below the chart is a legend for "Completed Certification Require..." with a blue dot and the value "false".

A red arrow points from the text above to the "View Report (AZ1: All PVs and Vols Cert (Pie ...)" link located below the pie chart.

Full Name ↑	Sum of Compl...
Beverly Welling	0
Dianne Muchow	0
Joanne Parkes	0
Margy Pracchia-Nibl...	0
MARK Niblack	0
Pamela Whitney	0
Paula Stefani	0
Robert W. Rose	0

Certification Process

Before any certifications are completed, all names are in one list without a checkmark in the box

This list includes any PVs that have not been given an assignment

Report: Contact, PV, Annual Certification, and Cert Level
AZ1: All PVs and Vols Cert (Pie Chart)

Total Records
11

Completed Certification Requirements ↑ ▾	Full Name ▾	Program Volunteer ID ▾	Annual Certification ID ▾
<input type="checkbox"/> <input type="checkbox"/> (11)	Dianne Muchow	PV00252174	AC00153595
	Susan Wilkes	PV00261205	AC00130467
	Joanne Parkes	PV00300525	AC00140939
	Paula Stefani	PV00314907	AC00133518
	Bruce Celiz-Hagen	PV00361507	AC00172083
	Therese Gribbins	PV00372970	AC00178440
	Robert W Rose	PV00056132	AC00138170
	Beverly Welling	PV00056970	AC00138034
	Pamela Whitney	PV00141866	AC00159366
	MARK Niblack	PV00170255	AC00156930
	Margy Pracchia-Niblack	PV00185565	AC00156929
Total (11)			

Certification Process

To check for any prospective volunteer candidates who need to have an assignment in the portal, choose “equals Under Consideration” from the dropdown menu in the

“Status Box” and then view the report

Notify ADS to update their assignment or change status

The screenshot shows a dashboard titled "Dashboard TA - R10 - AZ1 - Certifications" with a "Refresh" button. Below the title, it says "As of Oct 27, 2019 11:11 AM-Viewing as Robin Murphy". There are three filter boxes: "Status" with a dropdown menu, "District" with a dropdown menu, and "Certification Status" with a dropdown menu. The "Status" dropdown is open, showing options: "All", "equals Volunteer" (checked), and "equals Under Consideration" (highlighted with a red box). Below the dropdown is a table with names and numbers. A "View Report (AZ1: Vol & PV Certif...)" link is at the bottom left. On the right, there is a "Summary of Active a..." card with a "Record Count" of 47 and a "View Report (AZ1: All PVs and V..." link highlighted with a red box.

Name	Count
Aimee Hodgins	0
Alicia Gutzman	0
Anthony T Wi...	0
Barbara Jensen	0
Barbara R Gar...	0
Bonnie Burer	0
Bonnie Gordon	0
Brenda L. Ste...	0

Verify all entries on your district's list

After cleanup, it should include **ALL** returning volunteers and prospective volunteer candidates who completed training and intend to certify with some possible exceptions

Verify all entries on your district's list

After cleanup, it should include **ALL** returning volunteers and prospective volunteer candidates who completed training and intend to certify with some possible exceptions

Compare “Leaders” report with “Certification” report

Possible Reasons for a Missing or Unknown Volunteer Name on “Certification” report

- All volunteers with assignments in your district are on “Leaders” report
- A volunteer is listed on only 1 certification report based on their “route to” zip code
- If a volunteer’s “route to” zip code is incorrect they will be listed in the wrong district
 - Contact the ADS for assistance if you believe a name is incorrectly included on your list

More Possible Reasons . . .

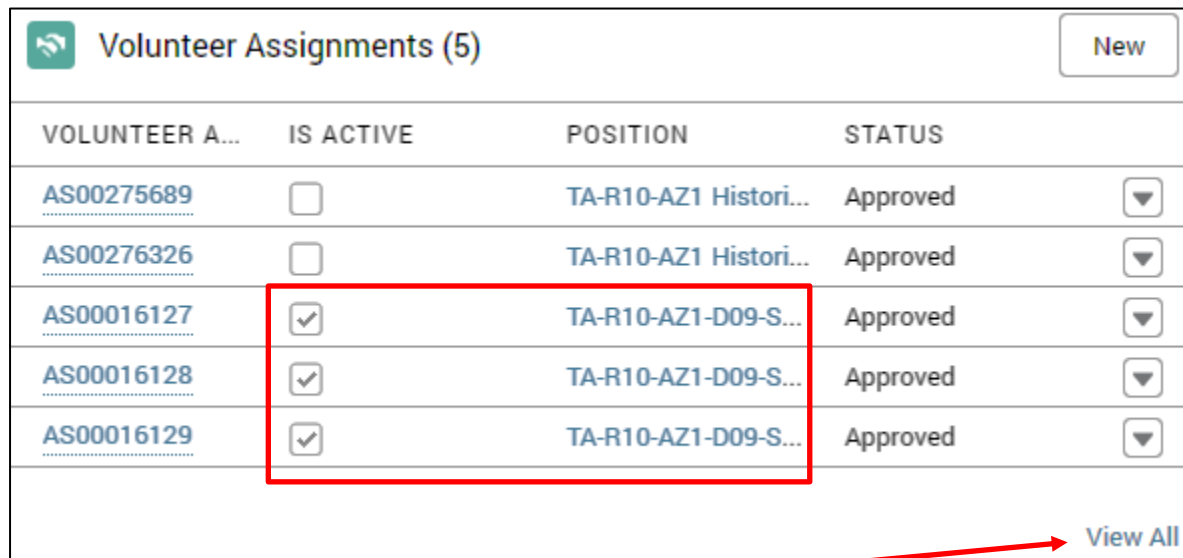
- Some volunteers have assignments in more than one district and/or state and their “route to” zip code is not in your district
- If their certification was recorded in another district, check their contact record to verify they are certified to the level required for the assignment(s) they have in your district and update if needed
- If certified in another state, add “AZ” to the state dropdown list after AZ certification is complete

Certification Process

To start the certification process, open each volunteer's contact record by clicking on their "Name"

Completed Certification Requirements ↑ ▾	Full Name ▾	Program Volunteer ID ▾	Annual Certification ID ▾
<input type="checkbox"/> <input type="checkbox"/> (11)	Dianne Muchow	PV00252174	AC00153595
	Susan Wilkes	PV00261205	AC00130467
	Joanne Parkes	PV00300525	AC00140939
	Paula Stefani	PV00314907	AC00133518
	Bruce Celiz-Hagen	PV00361507	AC00172083
	Therese Gribbins	PV00372970	AC00178440
	Robert W Rose	PV00056132	AC00138170
	Beverly Welling	PV00056970	AC00138034
	Pamela Whitney	PV00141866	AC00159366
	MARK Niblack	PV00170255	AC00156930
	Margy Pracchia-Niblack	PV00185565	AC00156929
Total (11)			

A quick hover over active position(s) in the Volunteer Assignments list card will help identify which certifications are required for each volunteer



VOLUNTEER A...	IS ACTIVE	POSITION	STATUS	
AS00275689	<input type="checkbox"/>	TA-R10-AZ1 Histori...	Approved	▼
AS00276326	<input type="checkbox"/>	TA-R10-AZ1 Histori...	Approved	▼
AS00016127	<input checked="" type="checkbox"/>	TA-R10-AZ1-D09-S...	Approved	▼
AS00016128	<input checked="" type="checkbox"/>	TA-R10-AZ1-D09-S...	Approved	▼
AS00016129	<input checked="" type="checkbox"/>	TA-R10-AZ1-D09-S...	Approved	▼

[View All](#)

Or click on “View All” to expand assignment list

Expanded Assignment List

	Volunteer Assignment: As... ▾	Is Active	▾ Position
1	AS00103284	<input type="checkbox"/>	TA-R10-AZ1-D09-S60050901 Local Coordinator
2	AS00275681	<input type="checkbox"/>	TA-R10-AZ1 Historical
3	AS00571541	<input checked="" type="checkbox"/>	TA-R10-AZ1-D09 Instructor
4	AS00594382	<input checked="" type="checkbox"/>	TA-R10-AZ1-D09 District Coordinator
5	AS00103283	<input checked="" type="checkbox"/>	TA-R10-AZ1-D09-S60050901 Counselor
6	AS00103285	<input checked="" type="checkbox"/>	TA-R10-AZ1-D09-S60050901 Electronic Return Originator
7	AS00463836	<input checked="" type="checkbox"/>	TA-R10-AZ1-D09-S60050901 Local Coordinator

Select Program Volunteer ID number in the Program Volunteer list card on the right side of the contact record

PROGR...	PROGRAM	STATUS	ASSIGNM...
PV0004...	Tax-Aide	Volunteer	▼

[View All](#)

Scroll down to the “Certification Bulk Edit” section

▼ Certification Bulk Edit

Certification	Complete	State
01. IRS Employee	<input type="checkbox"/>	
02. Volunteer Standards of Conduct Test	<input type="checkbox"/>	
03. Policy and Procedures Training	<input type="checkbox"/>	
04. Intake/Interview and Quality Review Training and Test	<input type="checkbox"/>	
05. Site Coordinator Training	<input type="checkbox"/>	
06. Site Coordinator Test	<input type="checkbox"/>	
07. Proficiency Problems	<input type="checkbox"/>	
08. Advanced Test	<input type="checkbox"/>	
09. Qualified Experienced Volunteer	<input type="checkbox"/>	
10. Military	<input type="checkbox"/>	
11. Foreign Student	<input type="checkbox"/>	
12. International	<input type="checkbox"/>	
13. Puerto Rico 1	<input type="checkbox"/>	
14. Puerto Rico 2	<input type="checkbox"/>	
15. Volunteer Applying for CE Credits	<input type="checkbox"/>	
16. State Training	<input type="checkbox"/>	

Click on the box to insert a checkmark for each completed item

Select Requiring States ▼

Certification Process

▼ Certification Bulk Edit

Certification	Complete	State
01. IRS Employee	<input type="checkbox"/>	
02. Volunteer Standards of Conduct Test	<input type="checkbox"/>	
03. Policy and Procedures Training	<input type="checkbox"/>	
04. Intake/Interview and Quality Review Training and Test	<input type="checkbox"/>	
05. Site Coordinator Training	<input type="checkbox"/>	
06. Site Coordinator Test	<input type="checkbox"/>	
07. Proficiency Problems	<input type="checkbox"/>	
08. Advanced Test	<input type="checkbox"/>	
09. Qualified Experienced Volunteer	<input type="checkbox"/>	
10. Military	<input type="checkbox"/>	
11. Foreign Student	<input type="checkbox"/>	
12. International	<input type="checkbox"/>	
13. Puerto Rico 1	<input type="checkbox"/>	
14. Puerto Rico 2	<input type="checkbox"/>	
15. Volunteer Applying for CE Credits	<input type="checkbox"/>	
16. State Training	<input type="checkbox"/>	

Select "AZ" from the State drop-down menu

If volunteer certified in another state, add "AZ" – more than 1 can be selected

Select Requiring States ▼

Certification Process

The Volunteer's certification is **NOT** complete until the bottom portion of the record is filled in by doing the following

- “Completed Certification Requirements” box is checked
- “ID Verified” box is checked
- Date is entered
- Select to save

Annual Certifications	Volunteer	Completed Certification Requirements	ID Verified	Date Certification Requirements Met and ID Verified	Lockout Date	Tax Year
AC00197620	Alicia Gutzman	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	2021-04-01	2020

←

You can use the back arrow to return to the list and choose the next volunteer's Name to repeat the process

Certification Process

As certifications are completed, volunteer names appear in two separate lists

- Names in the list without checkmark not completed
- Names in the list with checkmark are completed

Total Records			
23			
Completed Certification Requirements ↑ ▾	Full Name ▾	Program Volunteer ID ▾	Annual Certification ID ▾
<input type="checkbox"/> <input type="checkbox"/> (1)	Vicki Chittick	PV00314960	AC00133857
Subtotal			
<input type="checkbox"/> <input checked="" type="checkbox"/> (22)	Sheri Wright	PV00255484	AC00180519
	Neoma Scheff	PV00256499	AC00154517
	Thomas D Bebb	PV00259264	AC00156669
	Virginia McCall	PV00260530	AC00130440

The Certification Report must be run prior to the site opening date to verify that all volunteer names are in the completed list which allows them to work at their site

If a volunteer's name appears in the incomplete list

- The certification should be completed as soon as possible
- or
- If volunteer is not going to certify for any reason, notify the ADS to update contact record in the portal

Questions?

