

# **AZ TAX-AIDE CERTIFICATION - 2020**

**A. 2020 Tax Law & Training Resources:** The following Pubs/tools are in the AZ Tax-Aide web site.

Tax Prep Tab > Training & TaxSlayer > Training Manuals & Programs

1. Links to Link & Learn Advanced Courses and Certification
2. IRS Taking the Test Online Guide
3. 2020 Pub 4961 – Standards of Conduct Training Guide
4. 2020 Pub 4012 Modified
5. 2020 Pub 4491 Training Guide
6. 2019 Tax Aide Self Study Guide (will be updated for 2020)
7. 2020 Tax Aide NTTC Workbook with Release 1 Updates
8. 2020 New Tax Law Exercises – Garcia & Polite

**B. 2020 Pub 6744 Test – AARP – Client Facilitator – pass 1 & 2; Counselor - pass all 3 sections:**  
**1 - Standards of Conduct; 2 - Intake/Interview and Quality Review; 3 - Advanced Course**  
The NEW QEV test is optional and does not replace the Advanced Test

## **C. 2020 TaxSlayer Practice Lab**

1. Log into the Volunteer section of the Arizona Tax-Aide website at <http://aztax-aide.org/>
2. Click on the Tax Prep drop down menu, then choose “Training & TaxSlayer
3. Select the TaxSlayer Training drop down menu, then choose Practice Lab - Login
4. The Initial password is: TRAINPROWEB (all caps)
5. FIRST TIME USER: Set up an account using the instructions found at:
  - a. Training Manuals & Programs > IRS Taking Certification Tests Online (PDF)
6. RETURNING VOLUNTEERS – Use last year's login credentials
7. Prepare 3 Test Tax Returns from the Advanced section of Pub 6744:

IMPORTANT – SS Numbers are created by adding 00 and any four numbers (be consistent)

	<u>AGI</u>	<u>REFUND</u>
- Advanced Scenario 6 – Harris/Carly Franklin	\$48,645	<b>\$7,869 – (updated 2021)</b>
- Advanced Scenario 7 – Travis/Sylvia Kennedy	\$30,944	\$4,385
- Advanced Scenario 8 – Richard Roosevelt	\$52,813	\$1,166
8. From the Client List in TaxSlayer Practice Lab, find the tax return you wish to print.
  - a. Select the small Printer Icon next to the Tools box
  - b. In Print Options – Choose Print Return; Use the PDF to answer the Advanced questions

**D. Answer** the test question in Pub 6744 utilizing the Tax Returns created in practice Lab and Pub 4491.

## **E. Take the Online Tests**

Log into Link & Learn using the link provided in the Arizona Tax-Aide website

Tax Prep > Training & TaxSlayer > Training Manuals & Programs > Link & Learn Certification Test.

Use your name/password from last season. You should go to “My Account” tab and edit your name to match your legal ID. You can also create a new account using your name as shown on your ID.

On the “My Account” tab, make sure to leave the Site Coordinator Certification box blank.

If a passing grade is not obtained for the Advanced test, note the questions missed and contact your LC to make sure you understand why the question was missed. You may then attempt the **Retest**

**Failing the Advanced Test and Retest disqualifies you from certifying as a Counselor.**

## **F. Proficiency Exercises –**

In the NTTC Workbook (2020) Core Exercises – Anderson, Emerson, and King. Comprehensive exercise – Parsons. 2020 New Tax Law exercises Garcia and Polite (see A – 8 above).

## **G. AARP Portal Training –** Training listed below is required for All volunteers

Policy & Procedures, Tax Aide Technology & Security, Security Essentials

Location Coordinators also must pass the LC Training module.