

AZ TAX-AIDE CERTIFICATION - 2021

Tax-Aide Certification is comprised of 3 requirements: IRS, AARP, and AZ. Every volunteer must complete basic requirements, but some assignments require additional certification. Resources are available to assist each volunteer to successfully complete the certification process for their assignment. Explanations for the requirements are summarized below. The chart on the next page shows the certification requirements for each volunteer assignment.

- A. **IRS requirements:** (Pub 6744, Pub 4961, Pub 4491, Pub 5101 and Link & Learn)
 - Standards of Conduct – All volunteers
 - Intake, Interview & Quality Review - All volunteers except Support Facilitators
 - Advanced Exam – Local & Shift Coordinators, Counselors, ERO, Training Coordinators & Instructors
 - Site Coordinator Training - Local & Shift Coordinators
 - Military - Local & Shift Coordinators, Counselors and ERO's that complete any active military taxpayers.

- B. **AARP requirements:** (Pub 4012, Policy & Procedure Manual, AARP portal – LMS Training)
 - Security Essentials – District Coordinator, Local & Shift Coordinators, Counselors, ERO, Training Coordinators & Instructors
 - Tax-Aide Technology & Security – District Coordinator, Local & Shift Coordinators, Counselors, ERO, Training Coordinators & Instructors
 - Policy & Procedures – All volunteers
 - Service Delivery Models – All volunteers for 2021 (requirement based on site requirements)
 - Reimbursements – All New Volunteers, District Coordinator, Local & Shift Coordinators
 - District Coordinator Training – Beginning TY22 – All new District Coordinators
 - Local Coordinator Training – Local & Shift Coordinators

- C. **AZ requirements:** (NTTC workbook)
 - Scope Training – All volunteers (except: Support Facilitator)
 - AZ Tax training - Local & Shift Coordinators, Counselors, ERO, Training Coordinators & Instructors
 - NTTC proficiency exercises (4) - Local & Shift Coordinators, Counselors, ERO, Training Coordinators & Instructors

Resources: Publications and manuals are available on the Training tab of the AZ website.

- Pub 6744 – Volunteer Assistor's Test/Retest
- Pub 4961 – Volunteer Standards of Conduct -Ethics Training
- Pub 4491 – Training Guide
- Pub 5101 – Intake/Interview & Quality Review Training
- Pub 4012 – Volunteer Resource Guide
- Tax-Aide NTTC workbook – Rel 1 – updated throughout the tax season
- 2021 Tax Aide Self Study Guide
- TaxSlayer Practice Lab
- Link & Learn

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Chart of Required Certification by Volunteer Assignment

Assignment	IRS			AARP			AZ		
	S of C	I&I	Adv	P&P	LC	DC	AZ	Scope	Prof
Support Facilitator	Req			Req					
Client Facilitator	Req	Req		Req				Req	
Counselor	Req	Req	Req	Req			Req	Req	Req
Training Coordinator *	Req	Req	Req	Req			Req	Req	Req
Local Coordinator*	Req	Req	Req	Req	Req		Req	Req	Req
District Coordinator	Req	Req		Req		Req		Req	

* Training Coordinator includes ERO, Instructor and Training Specialist

* Local Coordinator includes Shift Coordinator

Key:

IRS Certification: (Pub 6744, Link & Learn) – Optional Tests are not shown

S of C = Standards of Conduct

I&I = Intake, Interview & Quality Review

Adv = Advanced test

LC = Site Coordinator test (**not shown** in above chart)

AARP Certification: (AARP Portal – Training Tab - LMS)

P&P = Policy & Procedures

Security Essentials (**not shown** in above chart)

Technology & Security Training (**not shown** in above chart)

Service Delivery Training (**not shown** in above chart)

Reimbursement Training (**not shown** in above chart)

Arizona Certification: (District Training Instructor)

AZ = Arizona Training

Scope = Scope training

Prof = Four Proficiency exercises in NTTC workbook

State Training Specialist: Available to assist Training Coordinators and Instructors via Email and Office Hours

District Instructors: Available to assist Counselors via In-Person, Email or Office Hours (depending upon Instructor)

Local Coordinators: Available to assist Support and Client Facilitators via In-Person, Email or Office Hours (depending upon Local Coordinator)

Arizona Tax-Aide website – Training Tab Resources (Pubs, manuals, videos)

Inquiry Form for volunteers to ask questions

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Revised: 11/8/2021

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Certification Hints:

Pub 6744 mirrors the Link & Learn online test. Answer all questions in the sections required for your assignment in Pub 6744 before taking the online test. See the above Chart to locate the required training sections for your assignment.

Use Pub 4491 as a study guide to answer most questions on the Standards of Conduct exam.

Use Pub 5101 as a study guide to answer most questions on the Intake/Interview & QR exam.

Counselors completing the Advanced exam will need to create 3 tax returns in **TaxSlayer Practice Lab** before answering the questions in Pub 6744.

Link & Learn tests require an 80% score to pass. ONE retest is available if an 80% passing score is not achieved on the initial test. If you are unsure of an answer, seek assistance from your instructor or use the Inquiry form on the AZ website to ask a question.

Each volunteer must provide a signed IRS Certification Form 13615 to their supervisor. The volunteer's name in the AARP portal and on the 13615 must match the volunteer's photo ID.

Proficiency exercises (NTTC workbook) answers will be provided after Practice Lab is updated.

ELDER:	AGI \$0000	Refund \$000
PARATA:	AGI \$0000	Refund \$000
THAM:	AGI \$0000	Refund \$000

Each District is required to select one additional NTTC exercise to complete. This selection should include the most common tax items handled within the district.

District Choice: AGI \$0000 Refund \$000