

Certification

Certification Components

- IRS
 - Link & Learn
 - Form 13615
- AARP
 - NTTC Proficiency Exercises
 - LMS e-Courses
- Arizona
 - State Tax Training/Test
- Portal Input

Certification Policy

- The DC (or designee) is responsible for entering and finalizing the certification requirements in the portal
- The ADS is responsible for monitoring progress
- Portal Certification Report is the **ONLY** official notice to the IRS that a volunteer has certified
- The 13615 Volunteer Agreement must be signed by the volunteer, but **IS NOT** a volunteer certification
- All volunteers at every site must be certified
- Active preparers (TSO) have certification verified

Certification Policy

- Validate the identity of each volunteer using government-issued photo ID
- **The volunteer's name on ID must match Form 13615 and name in both AARP Portal and TSO**
- Volunteer can go to the “My Account” tab in Link & Learn to edit name if required



- Form 13615 must be signed and dated by an Approving Official who has already been certified
 - TRS signs DC's, AC's, and Instructors Form 13615
 - DCs or Instructors sign LC's Form 13615
 - DCs, Instructors or LC's sign volunteer's forms
- All approved Form 13615's must be retained by the District until the end of calendar year

- Volunteers who are not certified:
 1. Are NOT covered by Volunteer Protection Act
 2. Are NOT allowed reimbursement
 3. Do NOT accumulate service award time
 4. Put Tax-Aide program at risk

- AARP Member Services is available to assist volunteers with portal access
1-866-839-0463
Monday thru Friday from 7 a.m. - 11 p.m.
- Do not submit a ticket – they will refer you to Member Services
- ADS is also a good resource

Assignments – Non-Leader

- Support Facilitator (not “Greeter”)
 - Helps taxpayers sign in, checks appointments
 - Does not handle Taxpayer’s documents
- Client Facilitator
 - Reviews/Discusses taxpayer documents - SCOPE
 - Makes discussion notes in Intake Booklet
 - Does NOT offer tax advice (requires certification)
- Counselor – (may be ERO)
 - Prepares, Reviews, Discuss in Scope tax items

02. Volunteer Standards of Conduct Test and 03. Policy & Procedures Training

Who: All Volunteers

Where: 02. - Link & Learn
03. - LMS

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, Counselors, Local and Shift Coordinators, Instructors, Training Coordinators, ERO, Training Specialists

Where: Link & Learn

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05. Site Coordinator Training

06. Site Coordinator Test

Who: Local and Shift Coordinators

Where: 05. - LMS
06. – Link & Learn

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Certification Requirements

07. Proficiency Problems

4 Required: Elder, Parada, Tham, and DC/LC choice of 1 Core or Comprehensive

08. Advanced Test (inc. HSA)

Who: Counselors, Instructors, Training Coordinators and Specialists, Local and Shift Coordinators and EROs

Where: 07. - NTTC Workbook
08. - Link & Learn

Certification
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Certification Requirements

Optional Certification

09. Qualified Experienced Volunteer

- Contains very advanced material
- Does not replace Advanced Test
- Does NOT qualify for Continuing Education Credits

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Optional Certification

10. Military

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

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16. State Training / Test

Required by all states that prepare state tax returns

Who: Counselors, Instructors, Training Coordinators, Training Specialists, and EROs

Where: Designed by each state

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01. IRS Employee
02. Volunteer Standards of Conduct Test
03. Policy and Procedures Training
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16. State Training

All new and/or assignment changes 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 or changed assignments
 - Volunteer’s Name and ID number
 - Assignment Starting and/or Ending Date(s)
 - Site location if different from current assignment

- No “Prospects” or “Under Consideration” remain

Questions?

