

## AZ TAX-AIDE CERTIFICATION - TY22

Tax-Aide Certification is comprised of 3 requirements: IRS, AARP, and Arizona. Every volunteer must complete basic requirements, but some volunteer 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 detailed below. The chart on page 2 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 returns.
  
- 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 – New volunteers for 2022 (training based on site model(s) used)
  - Reimbursements – All New Volunteers, District Coordinator, Local & Shift Coordinators
  - District Coordinator Training – All new District Coordinators
  - Local Coordinator Training – Local & Shift Coordinators
  
- C. **AZ requirements:** (Scope Manual, AZ Tax Training, 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 – Hardcopy is also available

Pub 4961 – Volunteer Standards of Conduct -Ethics Training

Pub 4491 – Training Guide

Pub 5101 – Intake/Interview & Quality Review Training

Pub 4012 – Volunteer Resource Guide – IRS hardcopy is available, NTTC E-version is preferred

Tax-Aide NTTC workbook – Rel 1 – updated throughout the tax season

2022 Tax Aide Self Study Guide

TaxSlayer Practice Lab

IRS 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 – required for Local & Shift Coordinators)

**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 = 4 assigned Proficiency exercises found in the 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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### Certification Hints:

IRS 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 Link & Learn Standards of Conduct exam.

Use Pub 5101 as a study guide to answer most questions on the Link & Learn 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 instructor. The volunteer's name in the AARP portal and on the 13615 must match the volunteer's photo ID. Only instructors may approve volunteers Form 13615.

Proficiency exercises (NTTC workbook) answers will be provided after Practice Lab is updated for TY22 in December

FERGUSON:	AGI \$0000	Refund \$000
NGUYEN:	AGI \$0000	Refund \$000
PARADA:	AGI \$0000	Refund \$000
THAM:	AGI \$0000	Refund \$000