


Certification

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

Certification Policy – # 1

- **All** Volunteers at every TA site must be certified
- Form 13615 Volunteer Agreement must be signed by the volunteer, but IT IS NOT the certification
- DC (or designee) is responsible for entering and finalizing ALL 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
- LC verifies each Active Preparer in TSO has completed certification

Certification Policy – # 2

- Form 13615 must be signed and dated by an Approving Official* who has already been certified
 - *TRS or *SC approves Training Coordinators, Instructors, DC's, LC's & Shift Coordinators 
 - TC's & Instructors approve DC, LC, Shift Coordinators and non-leader Form 13615
 - All signed Form 13615's must be retained by the Local Coordinator until the end of calendar year

Certification Policy – # 3

- Validate the identity of each volunteer using government-issued photo ID
- **The volunteer's name on ID must match**
 - Form 13615** – change in “My Account” in L&L
 - AARP Portal** – change in “My Account”-“Details” at aarp.org
 - TSO** – change made by software administrator
- Volunteer can go to the “My Account” tab in Link & Learn to edit name if required



- **Each Tax-Aide Volunteer has a Link & Learn account**

Counselors MUST complete the required L&L exams individually – NOT as a Group

- 1 - Training can occur within a group setting
- 2 - Exam answers MAY NOT be determined as a group
- 3 - Instructors MAY NOT recommend exam answers
- 4 - Instructors MAY NOT share exam answers

- 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 –
Michelle Kaplan = kaplanmw@gmail.com

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
 - Must be changed to “on hold” or “no match”

- 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. Cannot be Active Preparer in TSO
 5. Put Tax-Aide program at risk

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

Certification Requirements

02. Volunteer Standards of Conduct Test

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 Facilitator, Counselor, Local and Shift Coordinator, Instructor, Training Coordinator, ERO, Training Specialist

Where: Link & Learn

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16. State Training

Certification Requirements

05. Site Coordinator Training



06. Site Coordinator Test


Who: Local and Shift Coordinator

Where: 05. - LMS
06. - Link & Learn

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01. IRS Employee
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Certification Requirements

07. Proficiency Problems

4 Required: TBD, TBD, TBD, and DC/LC choice of 1 Core or Comprehensive exercise 

08. Advanced Test (inc. HSA)

Who: Counselor, Instructor, Training Coordinator and Specialist and ERO

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

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Optional Certification

09. Qualified Experienced Volunteer

- Contains advanced material
- Does not replace Advanced Test
- Does not qualify for CE 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

Where: Link & Learn

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16. State Training

16. State Tax Training



Required by all states that prepare state tax returns

Who: Counselor, Instructor, Training Coordinator and Specialist and ERO

Where: Instructor Led Training

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01. IRS Employee
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16. State Training



- Verify completion of requirements
 1. LMS Report shows:
 1. Policy & Procedures
 2. Site Coordinator (if applicable)
 2. Verify Proficiency Problems were completed
 3. Instructors verify State Tax Training completed

Questions?

