

AZ TAX-AIDE CERTIFICATION - TY23

Important Training & Testing website links.

SITE	Log in ID	Current Password	New Password
AARP Portal			
AZ Tax-Aide			
IRS Link & Learn			
TaxSlayer Pro – Practice Lab			
TaxSlayer Pro - Production			

IMPORTANT: Maintain a record of your Login ID's and passwords. They are required for updating.

Important Date: All certification requirements must be completed by: January , 2024.

NEW VOLUNTEER REQUIREMENTS

MINIMUM REQUIREMENTS FOR ALL NEW VOLUNTEERS:

1. AARP: LMS Courses (Use [AARP Portal](#) link)
 - a. Policy & Procedures
 - b. Technology & Security
 - c. Service Delivery Model – Drop Off (for sites using Drop Off model)
 - d. Service Delivery Model – Scan (for sites using Scan model for the 1st time)

2. IRS: Link & Learn ([Use IRS link](#))
 - a. Standard of Conduct (Pub 6744 & 4961)

REQUIRED FOR NEW CLIENT FACILITATORS (in addition to the above)

1. AZ State:
 - a. [Scope Manual TY23, Scope Training TY23](#)

3. IRS: Link & Learn ([Use IRS link](#))
 - b. Intake, Interview & Quality Review (Pub 6744 & 5101)

REQUIRED FOR NEW COUNSELORS (in addition to all the above)

1. Attend District New Counselor Training

2. AZ State:
 - a. AZ Tax Law Training
 - b. NTTC Exercises ([NTTC Workbook](#)) – Huberman, Martin, Parata & Quinn

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4. IRS: Link & Learn ([Use IRS link](#))
 - c. Advanced Exam (Pub 6744)

RETURNING VOLUNTEER REQUIREMENTS

REQUIRED FOR RETURNING CLIENT FACILITATORS

1. AARP: LMS Courses (Use [AARP Portal](#) link)
 - a. Policy & Procedures
 - b. Technology & Security
 - c. Service Delivery Model – Drop Off (for sites using Drop Off model)
 - d. Service Delivery Model – Scan (for sites using Scan model for the 1st time)

State:

- a. [Scope Manual TY23, Scope Training TY23](#)
5. IRS: Link & Learn ([Use IRS link](#))
 - b. Standards of Conduct (Pub 6744 & 4961)
 - c. Intake, Interview & Quality Review (Pub 6744 & 5101)

MINIMUM REQUIREMENTS FOR RETURNING COUNSELORS: (In addition to the above) **(Includes TRS, Training Coordinators, Instructors and ERO's)**

1. Attend Returning Counselor Training
2. AZ State: (Use AZ Tax-Aide link above)
 - a. AZ Tax Law Training
 - b. NTTC Exercises ([NTTC Workbook](#)) Huberman, Martin, Parata & Quinn
6. IRS: Link & Learn ([Use IRS link](#))
 - c. Advanced Exam

REQUIRED FOR DISTRICT, LOCAL & SHIFT CORDINATORS

1. AARP: LMS Courses (Use [AARP Portal](#) link)
 - a. Policy & Procedures
 - b. Technology & Security
 - c. District Coordinator (New DC's Only)
 - d. Local Coordinator (All LC's and SHO's only)
2. AZ State:
- a. [Scope Manual TY23, Scope Training TY23](#)
 - b. AZ Tax Law Training (Optional without a Counselor assignment)
 - c. [NTTC Exercises](#) (Optional without a Counselor Assignment)
 - i. Huberman, Martin, Parata & Quinn

7. IRS: Link & Learn ([Use IRS link](#))

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- d. Standards of Conduct (Pub 6744 & 4961)
- e. Intake, Interview & Quality Review (Pub 6744 & 5101)
- f. Site Coordinator Training (LC Only)
- g. Advanced Exam (Pub 6744) – (Optional without a Counselor Assignment)

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 Training Handbook](#)

Tax-Aide [NTTC workbook](#) – updated throughout the tax season [2023](#)

[Tax Aide Self Study Guide](#)

[TaxSlayer Practice Lab](#)

[Instructions to Access TaxSlayer Practice Lab](#)

[IRS Link & Learn](#)

Volunteers may use Pub 6744 and enter answers on paper, but every volunteer MUST enter their answers into Link & Learn online.

State Training Specialist: [Geoffrey Wolfe – ArizonaTaxAide@gmail.com](mailto:GeoffreyWolfe@gmail.com)

Available to assist Training Coordinators and Instructors via Email and Office Hours

District Instructor(s): [ENTER NAME & CONTACT INFO:](#)

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

Local Coordinator(s): [ENTER NAME & CONTACT INFO:](#)

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 a question.

Certification Hints

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[IRS Pub 6744](#)

This publication mirrors the Link & Learn online test. Answer all questions in the sections required for your AARP assignment in Pub 6744 before taking the online test.

[IRS Pub 4491](#)

Use as a study guide to answer most questions on the Link & Learn Standards of Conduct exam.

[IRS Pub 5101](#)

Use 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.

[IRS 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 Volunteer 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 photo ID. Only certified Instructors or District/Local Coordinators may approve a volunteers Form 13615.

Proficiency exercises ([NTTC workbook](#)) answers will be provided after Practice Lab is updated for TY23 in December

HUBERMAN:	AGI \$ TBD	Refund \$ TBD
MARTIN:	AGI \$ TBD	Refund \$ TBD
PARATA:	AGI \$ TBD	Refund \$ TBD
QUINN:	AGI \$ TBD	Refund \$ TBD