

# AZ TAX-AIDE CERTIFICATION - TY25

**Important Date:** All certification requirements must be completed by: **January 30, 2026.**

## VOLUNTEER REQUIREMENTS

### **MINIMUM REQUIREMENTS FOR ALL VOLUNTEERS:**

1. AARP: LMS Courses ([AARP Portal](#))
  - a. Policy & Procedures
  - b. Technology & SecurityNote: Test out feature is available with prior year completion
2. IRS: Link & Learn ([IRS Link & Learn](#))
  - a. Volunteer Standard of Conduct (Pub 6744 & Pub 4961)

### **REQUIRED FOR CLIENT FACILITATORS (in addition to ALL the above)**

1. IRS: Link & Learn ([IRS Link & Learn](#))
  - a. Intake, Interview & Quality Review (Pub 6744 & Pub 5101)
2. Arizona AARP Tax-Aide: ([Use AZ website](#))
  - a. Scope Manual Training TY25

### **REQUIRED FOR COUNSELORS (in addition to ALL the above) (Includes TRS, Training Coordinators, Instructors & ERO's)**

1. IRS: Link & Learn ([IRS Link & Learn](#))
  - a. Advanced Certification\* (Pub 6744)  
\*Basic Certification with Local Coordinator approval only.
3. Arizona AARP Tax-Aide:
  - a. AZ Tax Law Training – Instructor in classroom
  - b. NTTC Exercises ([NTTC Workbook](#)) – Assigned by Instructor

### **REQUIRED FOR DISTRICT, LOCAL & SHIFT CORDINATORS (in addition to ALL the above)**

1. AARP: LMS Courses ([AARP Portal](#))
  - a. District Coordinator (New DC's Only)
  - b. Local Coordinator (All LC's and SCO's)
2. IRS: Link & Learn ([IRS Link & Learn](#))
  - a. Site Coordinator Training (All LC's and SCO's)
  - b. Advanced Exam (Pub 6744) is optional without a Counselor Assignment
3. Arizona AARP Tax-Aide:
  - a. AZ Tax Law Training is optional without a Counselor Assignment
  - b. [NTTC Exercises](#) are optional without a Counselor Assignment

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## 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

**NOTE:** Always consult the latest online version – page 203, which identifies errors

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 Training workbook](#) – updated throughout the tax season

[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: Joyce Zehr – zehrjo@hotmail.com

Available to assist Training Coordinators and Instructors.

Arizona Tax-Aide website –

Training Tab Resources (Pubs, manuals, videos). Inquiry Form for volunteers to ask a question.

## **Certification Hints**

[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. Always consult the online version of Pub 6744 – page 203 which identifies known errors before submitting your answers.

[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.

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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% pass 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 by your instructor.