

# Certification

# Certification Components

- **IRS**
  - Link & Learn (3 tests for counselor)
  - Form 13615 – Volunteer Agreement
- **AARP**
  - LMS e-Courses (2 tests for counselor)
- **Arizona**
  - NTTC Proficiency Exercises (2)
  - AZ Tax Law Training
  - Scope Training

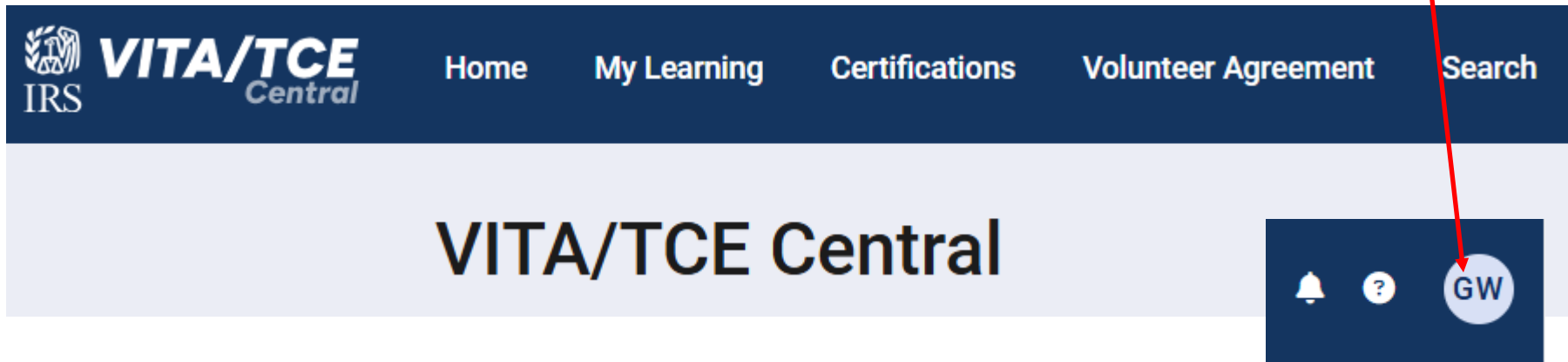
# Certification Policy

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- **EVERY** Volunteer at each TA site must be certified
- Form 13615 Volunteer Agreement must be signed by the volunteer and sent to Instructor or LC
- LC verifies completed certifications to DC
  - Volunteer Agreement
  - Proficiency Exercises
  - AZ State Training

# Certification Policy

- **Your name on photo ID must match**
  - Form 13615** – change in “Profile” in Link & Learn
  - AARP Portal** – change in “My Account”-“Details” at aarp.org
  - TSO** – change is made by software administrator
- Volunteers go to your “PROFILE” by clicking your avatar on the Link & Learn Home Screen – to edit information



- **Your Link & Learn Profile**

 Account

Account Information
Profile Image
Contact Information
User Profile Details
Volunteer Position(s)
Form 13615 Details
Continuing Education

Verify Name and reset password

Add a Profile picture

Add/Update contact information

Add Profile components

Add Volunteer assignments

Add Years of Volunteering

Add CE Certification

- **IRS requires every Volunteer must have their own Link & Learn account**

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

- 1** - Training may occur in a group setting
- 2** – Test answers **MAY NOT** be shared
- 3** - Instructors **MAY NOT** “recommend” or share 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 OneSupport ticket –

- 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
  - Helps taxpayers sign in, checks appointments
  - Does **NOT** handle Taxpayer's documents
- Client Facilitator
  - Review/Discuss taxpayer documents - SCOPE
  - Makes document notes in Intake Booklet (gray)
  - Does **NOT** offer tax advice (requires certification)
- Counselor – (including ERO)
  - Interviews, Prepares, Reviews, Verifies Scope
  - Enters notes of discussion in Intake Booklet

## Instructors:

- Must be certified before instructing
- Verifies completion of requirements
- Approves Form 13615\*
- Forwards approved Forms 13615 to DC
- Verifies 2 Proficiency exercises completed
- Verify State Tax Training was completed

\* if complete during training

# Questions?

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