



2021-2022 New Tax Preparer Volunteer Learning Map

Use this document to guide you through the steps of becoming an IRS-certified Volunteer Tax Preparer with the MFS CASH Oregon VITA program or with AARP Tax-Aide in the Portland metro area.

Step		How to Access	Timeline	Notes
1	Pass IRS Volunteer Standards of Conduct and Intake Interview Exams	Review questions in IRS Pub 6744 , p. 14 and 24 Read IRS Pub 4961 and Pub 5101 Take Exams on IRS Link & Learn Certification	Est. mid-Nov. 1 - 4 hrs.	Make sure you review questions and prepare answers in advance. Passing grade is 80%. We will send out an email when exams are available. Advance to the next step in the meantime.
2	Complete online New Tax Preparer Training Course on Moodle	Visit https://learn.mfs-cashoregon.org/my/ . Follow these steps to create an account and register for course.	Available now 30-40 hrs.	Be sure to complete each part of the course. The final case "Grant" will be available in early December.
3	Pass IRS Advanced Exam and send Volunteer Agreement to District Coordinator	Review questions in IRS Pub 6744 , p. 74 Take Exam on IRS Link & Learn Certification	Est. mid-Nov. Complete by Jan. 10 3-5 hrs.	Make sure you review questions and prepare answers in advance. Refer to coursework, IRS Pubs 4012 and 4491 . Passing grade is 80%. We will send out an email when exams are available.
4	Register for and attend Home Stretch session with your District			
5	Additional AARP Tax-Aide Training	Check in with your District Coordinator	TBD	Volunteers that are serving in the AARP Tax-Aide program may need to complete additional LMS training through the AARP portal and practice problems.

How to Get Help with Training and Certification

Becoming an IRS-Certified Volunteer Tax Preparer can be a long and somewhat challenging journey. Fortunately, you are not alone! At each step of the journey, you will have access to support from experienced volunteers who can help you navigate the certification process and training resources.

Support Resource	How to Access	Notes
Training Support Hotline	Call 844-925-4770	If no one is available to answer, leave a message and someone will get back to you as soon as possible.
Zoom Office Hours	Check How to Get Help with Training page for schedule	Stop by to ask a question, hear others' questions, or to see a friendly face while you're making your way on your certification journey.
Virtual Chatroom Forum	Available in New Tax Preparer Training Course on Moodle under "How to Get Help."	Ask a question or respond to others' questions. Experienced volunteers will be monitoring the forum to help.
Oregon VITA & TCE Website	https://ortaxaide.org/	Includes commonly used tax tools

Login and Password Cheat Sheet

You will need to remember lots of logins and passwords as part of the training and certification process. You'll be able to do "Forgot Password" if you forget how to log in, but use this cheat sheet to keep track of all your passwords.

Resource	Access Link	Login Information
IRS Link & Learn Certification	https://www.linklearncertification.com/	Username: Password:
Moodle	Log into your volunteer account and click on "Access Moodle Courses."	Username: Password:
TaxSlayer Practice Lab	https://vita.taxslayerpro.com/IRSTraining/en/Account/Access Site Password: TRAINPROWEB	Username: Password:
AARP Volunteer Portal (AARP Tax-Aide volunteers only)	https://aarpvolunteer.force.com/vtm/s/	Username: Password: