

# LEARN TO PREPARE TAXES

**QUESTIONS answered by emailing [vita.aimla@gmail.com](mailto:vita.aimla@gmail.com)**

***Training materials must be downloaded when available.***

*Publication 4012, 4491, and Form 6744 from IRS Forms. Available electronically.*

*PowerPoints can be downloaded (See recording instructions).*

Access **Link and Learn Taxes - Online Training** at: <http://apps.irs.gov/app/vita/>

## Certification Test

Certification testing is required to participate as a VITA volunteer. Prior to taking any of the certification tests in the Link and Learn system, it is highly recommended you take the test in the Form 6744. This is the actual test and your answers should be entered into Link and Learn for certification. **If you do not pass with 80%, email me ([vita.aimla@gmail.com](mailto:vita.aimla@gmail.com)) to clarify any tax law issues. Do not attempt to take the retest until you understand the reason for your errors. Remember, only two attempts are allowed to certify in the Link and Learn system.**

## Accessing the Training Documents

You may access the PowerPoint Slide Presentation in an Adobe file on Google Drive:

[https://drive.google.com/drive/folders/1Dwp-nno9EFCQBujQVF28FzMHgweNFbqf?usp=drive\\_link](https://drive.google.com/drive/folders/1Dwp-nno9EFCQBujQVF28FzMHgweNFbqf?usp=drive_link)

## Accessing the Training Recordings via YouTube

As the recordings are available, they are added to the class list. See page 2

If you have any errors and/or problems, please contact me at [vita.aimla@gmail.com](mailto:vita.aimla@gmail.com)

## ZOOM LINK for all trainings:

<https://us02web.zoom.us/j/86555024274?pwd=ZjJEcklvQXEzMFkxMjdXU1VpZ2FJdz09>

Meeting ID: 865 5502 4274

Passcode: 918812

Send all questions to Kathy Dixon at [vita.aimla@gmail.com](mailto:vita.aimla@gmail.com)



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## Training Class:

**Basic Training: Classes 1-8**

**Advanced Training: Classes 1-11**

<p><b>Class 1: Return VITA Certification Levels – Self Study:</b> <a href="https://youtu.be/SWmabVYnPwQ">https://youtu.be/SWmabVYnPwQ</a> Learn the different certification levels for the VITA program. Choose the one that is right for you. Talk to your Volunteer Organization for their requirements. This class also includes instructions for signing onto <b>Link and Learn</b>.</p>
<p><b>Class 2: Standards of Conduct – Self Study</b> <a href="https://youtu.be/c7MkusPUsXo">https://youtu.be/c7MkusPUsXo</a> Learn and understand your role and responsibility under the Volunteer Income Tax Assistance Program (VITA).</p>
<p><b>Class 3: Intake/Interview – Self Study</b> <a href="https://youtu.be/Vli0SUy0n3o">https://youtu.be/Vli0SUy0n3o</a> Learn the basics of the interview process as well as practicing due diligence for gathering information for the preparation of the tax return. This class also includes instructions for signing onto the <b>Practice Lab</b>.</p>
<p><b>Class 4: Who Must File</b> <a href="https://youtu.be/XZVsUkn3TJQ">https://youtu.be/XZVsUkn3TJQ</a> Learn the beginning items for 1040 tax preparation. This class includes information about the 5 Filing Status.</p>
<p><b>Class 5: Who Is a Dependent</b> <a href="https://youtu.be/YUUJaqeOe1wU">https://youtu.be/YUUJaqeOe1wU</a> Learn the beginning items for 1040 tax preparation. This class includes information about the Personal &amp; Dependency Exemptions.</p>
<p><b>Class 6: Basic Income, Deductions and Credits Part I</b> <a href="https://youtu.be/0ma7ZQrCapY">https://youtu.be/0ma7ZQrCapY</a> Learn income items for 1040 tax preparation. This class includes: W-2; Unearned income; Kiddie Tax; State Refunds; Taxable Pensions; Unemployment, Social Security; and Line 21 other income. California items included. <b>YouTube updated 11/4/2023</b></p>
<p><b>Class 7: Basic Income, Deductions and Credits Part II</b> <a href="https://youtu.be/0HOMRpyOWV4">https://youtu.be/0HOMRpyOWV4</a> Learn the income items in scope for the Advanced level (builds on the prior training sessions). This class includes: 1099-Miscellaneous Income; Advanced Pension items; Unreported Tips; and additional items.</p>
<p><b>Class 8: Basic Health Care Coverage –</b> <a href="https://youtu.be/pkLymjPekcs">https://youtu.be/pkLymjPekcs</a> Learn the basics for Health Care requirements for the Basic Certification level.</p>
<p><b>Class 9: Advanced Income –</b> Learn the income items in scope for the Advanced level (builds on the prior training sessions). This class includes: 1099-Miscellaneous Income; Advanced Pension items; Unreported Tips; and additional items.</p>
<p><b>Class 10: Advanced Adjustments, Taxes, Credits</b> Learn the adjustments, tax and credit items in scope for the Advanced level (builds on the prior training sessions). This class includes: Itemized Deductions; Taxes; Credits; and Miscellaneous Items. Premium Tax Credit and California law included.</p>
<p><b>Class 11: Advanced Health Care Coverage – See recording for Class 8</b> Learn the basics for Health Care requirements for the Advanced Certification level.</p>
<p><b>Optional: ITIN</b> Learn how to prepare the return to apply for ITIN.</p>
<p><b>Optional: Estimated Taxes</b> Learn what is required for estimated taxes.</p>