November 2023

# VITA/TCE Volunteer Tax Alert

## VTA 2024-01 Changes to Form 6744, VITA/TCE Volunteer Assistor’s Test/Retest

### Purpose

To inform volunteers about identified issues with the tests.

### Message to Volunteers

Volunteers should make the changes below to their Form 6744 to ensure accurate completion of the tests.

**NOTE**: Link and Learn Taxes is scheduled to launch on December 1st. Volunteers wanting to certify earlier should use the electronic VITA/TCE training products.

#### Use caution when completing the following test and retest scenarios:

* **Basic, Scenario 3**
  + - Page 62, Ian’s age should be 17.
* **Basic, Scenario 7**
  + - Page 42, Box 5 of Form SSA-1099 should be $15,000.
* **Basic, Scenario 9**
  + - Page 52, Hailey Simpson’s Savings Account number 987654321
* **Advanced, Scenario 7**
  + - Page 79, Form 1099-R is missing the Payer’s TIN. Use any EIN for this scenario.
* **Advanced Scenario 7 and 8**
  + - Schedule C, car expenses, Practice Lab may ask for the mileage to be split into two parts of the year. TaxSlayer has been notified of this issue.
* **Intake/Interview and Quality Review Certification**
  + - * **Test Question 3**

Change the question to read as, “The Basic certification level is required to prepare a return with unreported tip income.”

* + - * **Retest Question 3**

Change the question to read as, “The taxpayer answered “Yes” to Form 13614-C Part III Question 2 “Tip Income”. What certification level is needed to prepare a return with unreported tips?”

* **Over the Phone Interpreter**
  + - **Test Question #4**

Change response A to 5590.

### Resources

Any questions related to TaxSlayer, or the Practice Lab should be directed to your relationship manager.

For specific information refer to the following resources:

* [TaxSlayer VITA/TCE Blog](https://vitablog.taxslayerpro.com/)
* [Pub 4491, VITA/TCE Training Guide](https://www.irs.gov/pub/irs-pdf/p4491.pdf#p=9), Important Changes lesson

**Thank you for volunteering and for your dedication to top QUALITY service!**