

National Tax Training Committee

Self-Study Pathway to Certification

Tax Year 2025

FOR USE BY AARP FOUNDATION TAX-AIDE VOLUNTEERS ONLY

Self-Study - Pathway to Certified Tax-Aide Volunteer¹

	Notes	Date	Done
Volunteer sign-up; AARP portal; Tax Aide volunteer. https://volunteers.aarp.org/	Go to the AARP Volunteer portal and create a login. Write down and remember your passwords throughout.	Prior to New Volunteer Orientation	
Attend New Volunteer Orientation.	Virtual OR “In person” meeting: - Receive and verify your Volunteer ID number. - Receive IRS Form 6744 Test/Retest book. - Meet your assigned Mentor or Instructor and get their email/phone number.	Oct, Nov, or early Dec (when scheduled)	
Begin the Self-Study Counselor Training and Certification Course .	This course has 18 lessons which you should complete before taking the IRS Advanced Tax exam. The lessons are short and easy, so pace yourself to be able to finish the course and take the exam by mid-December. We suggest creating your own schedule to be sure you will not be rushed to meet this deadline.	Oct, Nov, or early Dec (your discretion)	
Self-Study Counselor Training and Certification Course – Lesson 1.	Lesson 1: - Create Link & Learn account. - Learn Volunteer Standards of Conduct (VSOC). - Take IRS VSOC exam through Link & Learn. - Your test result will show on your Form 13615 Volunteer Standards of Conduct Agreement. - You may take a retest if you do not pass the first time, but you only get two chances to take the tests, so be sure you feel confident before starting your tests.		

¹ This is the National Tax Training Committee’s generic list of steps for self-study students and groups. Always follow any “local” or district adjustments and additions.

Self-Study Counselor Training and Certification Course – Lesson 2.	Lesson 2: - Learn about client interviewing and completing our intake forms. - Take IRS Intake and Interview/Quality Review exam through Link & Learn. - Your test result will show on your Form 13615 Volunteer Standards of Conduct Agreement.		
Self-Study Counselor Training and Certification Course – Lesson 3.	- Learn to use NTTC resources: NTTC 4012, NTTC 4491, and various other helpful resources.		
Self-Study Counselor Training and Certification Course – begin Basic Tax Topics – Lessons 4 through 9.	Lesson 4: - Set up a Practice Lab acct. - Learn about TaxSlayer, the software we use, through practice tax returns. Start with entering taxpayer info and wages.		
Continue with Self-Study Lessons 5 through 9.	- Be sure to ask your Mentor or Instructor any questions you have as you proceed.		
Continue with Self-Study Certification Lessons Advanced Tax Topics – Lessons 10 through 18.	- Be sure to stay in touch with your Mentor or Instructor.		
Sign-up for volunteer tax preparation times and locations.	Your Mentor or Instructor should be able to help.	During Training	
Complete 4 assigned NTTC Workbook proficiency exercises if required by your Instructor.	After completing the exercises, save a copy of the 1040s as a pdf.	After Self-Study course is complete	
Answer the Advanced Tax exam questions before you start the exam.	Suggestions: - Write your answers in the printed IRS Form 6744 before you take the exam. - Discuss your answers with your Mentor or Instructor if you have any doubts. - If you do not pass the test, you will have an opportunity for a retest. Prior to taking the retest, discuss the incorrect questions with your Mentor or Instructor. You have two chances to pass the tests.	Nov or Dec	

Virtually sign the Volunteer Standards of Conduct Agreement – VITA/TCE Programs Form 13615.	Review Taking the Certification Tests Online to refresh your mind on the process. After virtually signing the Volunteer Agreement, save it as a pdf on your computer.	After tests are passed and complete	
Advise your Mentor that you have completed all the steps in the training and testing process.	You may be asked to email your workbook problems pdfs and then revise the exercises after they are reviewed.	December or January	
Complete required Foundation LMS courses in your AARP portal account.	Learning Management System: - Courses to be completed will be loaded under your Portal ID.	December or January	
Receive your site work assignment.	- Meet your Local/Site Coordinator; may be done in person, virtually, or by phone. - Receive and verify your work schedule. - Ask any questions that apply to your assignment such as days, hours, locations, what to wear, what to bring, what to expect, etc.	January	
Begin 1 st day of tax return preparation at a volunteer site – Enjoy your new opportunity to help those in your community!	Most sites allow a new tax preparer to shadow an experienced preparer for the first days.	Week of February 1	