

Catalyst Miami Tax Training Tools and Tax Prep Resources

Resources for IRS VITA Training / Exam / Certification

[Pub 4012 - VITA Volunteer Resource Guide \(aka Tax Bible\)](#)
[Pub 6744 - VITA/TCE Volunteer Assistor's Test/Retest Booklet](#)
[Pub 4961 - VITA/TCE Volunteer Standards of Conduct - Ethics Training](#)
[Pub 5101 - VITA/TCE Intake/Interview & Quality Review Training](#)
Form 13614-C - [Intake & Quality Review Form](#)

[Practice Lab - TaxSlayer](#)

- Practice Lab Password: TRAINPROWEB

[Certification Exam](#) - Link & Learn

Additional Training Resources

[IRS VITA Training Resources](#)

Resources for Tax Prep Volunteering

**(We will review this during orientation in January you
DO NOT need to review this for the exam)**

Get Your Refund (Software we use to collect taxpayer information and records)

[Get Your Refund Training Modules](#) (Check This Training Resources First for Get Your Refund Training)

Review the following Modules from the link above

- 1 - Intro to GetYourRefund
- 2 - Client Process
- 3 - The Hub Overview
- 4 - Tips for Talking to Clients
- 5 - Security Checklist
- 7 - Tax Preparer
- 8 - Quality Reviewer

Get Your Refund DEMO LINK (Practice Version of GetYourRefund)

<https://demo.getyourrefund.org/demo67>

Get Your Refund LIVE LINK (Software we use to collect taxpayer information & records)

<http://getyourrefund.org/catalystmiami>

TaxSlayer LIVE LINK (Software we to prepare tax return)

<http://vita.taxslayerpro.com>

(More Below)

- Once you click on the link, click on the box in the middle labeled Pro Online - **DO NOT CLICK THE RED BUTTON ON THE TOP CORNER LABELED My Account Login**

Additional IRS Resources (if needed)

[Publication 17 \(2024\)](#)

[Taxpayer Consent Form](#)

[Pub 4299 - Privacy, Confidentiality, and Civil Rights Guide](#)

[Pub 5088 - Site Coordinator Training](#)

[IRS Updated Forms Finder](#) - Find any form here!

Catalyst Miami Tax Prep Appointment Request Link

catalystmiami.org/taxprep

Quality Site Requirement Alerts (QSRA) 2026

[QSRA 2026-01 Intake/Interview and Quality Review Certification Test Update](#)

Volunteer Tax Alerts (VTA) 2026

[VTA 2026-01. Changes to Form 6744. VITA/TCE Volunteer Assistor's Test/Retest](#)

[VTA 2026-02. Changes to Form 6744. VITA/TCE Volunteer Assistor's Test/Retest](#)

Questions?

Email chrism@catalystmiami.org or gustavoc@catalystmiami.org

Volunteer Schedule - Shadowing & Tax Prep

(Please shadow at least two 90 minute tax appointments during this period)

Wednesdays & Thursdays

- February 25, 26
- March 4, 5, 11, 12, 18, 19, 25, 26
- April 1, 2, 8, 9, 15, 16, 22, 23, 29, 30
 - Appointments on these days are at 12pm, 1:30pm, 3pm, 5:30pm, 7pm

Saturdays

- February 28
- March 14, 28
- April 4, 11
 - Appointments on these days are at 10am, 11:30am & 1pm

We recommend that you volunteer in at least 3 hour blocks at a minimum since that will give you two tax clients as each appointment is scheduled for 90 minutes but it is not required.

Sign up for shifts at pointapp.org use the link that was sent to your inbox. If you do not have a link then email chrism@catalystmiami.org.