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 - TaxSlaver

Practice Lab Password: TRAINPROWEB

Certification Exam - Link & Learn

Additional Training Resources

Prosperity Now VITA Train: An online self-paced training resource 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)

<u>Get Your Refund Training Modules (Check This Training Resources First for Get Your Refund Training)</u>

Get Your Refund FAQ for Partners & Volunteers

Get Your Refund Training Center

Get Your Refund Orientation Decks (used during VITA Orientation)

- 0 GetYourRefund Overview Deck
- 1 Client Process Training Deck
- 2 "The Hub" Training Deck
- 3 Tax Preparer Training Deck
- 4 Quality Review Training Deck

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)

<u>vita.taxslayerpro.com</u> - 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 or catalystmiami.org/taxclient

Quality Site Requirement Alerts (QSRA) 2025

QSRA 2025-01 Quality Site Requirement Alert - Quality Site Requirement Updates QSRA 2025-02 Quality Site Requirement Alert - Quality Training Recordings

Volunteer Tax Alerts (VTA) 2025

<u>VTA 2025-01 Volunteer Tax Alert</u> - Changes to Form 6744, VITA/TCE Volunteer Assistor's Test/Retest

Questions?

Email chrism@catalystmiami.org

Volunteer Schedule - Shadowing (Please shadow at least two tax appointments during this period)

Wednesdays & Thursdays

- February 5, 6, 12, 13
 - o Appointments on these days are at 12pm, 1:30pm, 3pm, 5:30pm, 7pm

Saturdays

- February 15
 - Appointments on these days are at 10am, 11:30am & 1pm

Volunteer Schedule - Tax Prep

Wednesdays & Thursdays

- February 19, 20, 26, 27
- March 5, 6, 12, 13, 19, 20, 26, 27

- April 2, 3, 9, 10, 16, 17, 23, 24, 30
- May 1
 - o Appointments on these days are at 12pm, 1:30pm, 3pm, 5:30pm, 7pm

Saturdays

- March 1, 15, 29,
- April 5, 12
 - o 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.