

How to Use This Guide

This publication is designed as a guide to assist you in preparing a return using TaxSlayer.* Not all forms are authorized for all volunteer programs. Forms intended specifically for the Military VITA Program will be annotated as such. Volunteers should only provide tax assistance based on their level of certification—Basic, Advanced, Military, International, Foreign Student and Puerto Rico 1 & 2. The Qualified Experienced Volunteer test covers advanced level competencies but will be an abbreviated test. Partners or sites may determine, at a local or national level, if they will accept this test for certification.

The screening sheets/decision trees, charts and interview tips are from your training materials and Publication 17, Your Federal Income Tax Guide For Individuals. Use these tools during the dialogue with the taxpayer—“ask the right questions; get the right answers.”

Interactive Tax Assistant (ITA), is an excellent tool to guide you through answers to tax law questions and is available on the IRS website.

SPEC allows volunteers to use the IRS provided software to prepare and electronically file their own tax return and the returns of family and friends. Unlike VITA/TCE returns, these returns have no income or tax law limitations.



The software may change after this publication becomes available. Screen shots in this guide may depict last year's version of the software. Follow the menus and prompts to enter current year tax information in the software. If additional information is needed, refer to TaxSlayer's VITA/TCE Blog. The blog will keep you up to date with any changes and notifications regarding preparing, creating or modifying returns. Publication 4491X, VITA/TCE Training Supplement, will be released in January to notify volunteers of any tax law and software updates.

*TaxSlayer is a copyrighted software program owned by Rhodes Computer Services. All screen shots that appear throughout the official Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) training materials are used with the permission of Rhodes Computer Services.