

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](#)
- [Pub 4491, VITA/TCE Training Guide](#), Important Changes lesson

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