



November 2023

# **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 1<sup>st</sup>. 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, lan'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!