



VITA/TCE Training

Practice Lab

Using the Practice Lab

Contents

Using the Practice Lab.....	3
Creating a Login.....	3
Signing In.....	7
Retrieving a User Name.....	9
Resetting Your Password	12
Using the Practice Lab	18
Preparing Practice Returns.....	19
Using the Office Client List.....	21
Index.....	24

Using the Practice Lab

After completing this topic, you will be able to:

1. Navigate to the IRS Practice Lab.
2. Create a Practice Lab login.

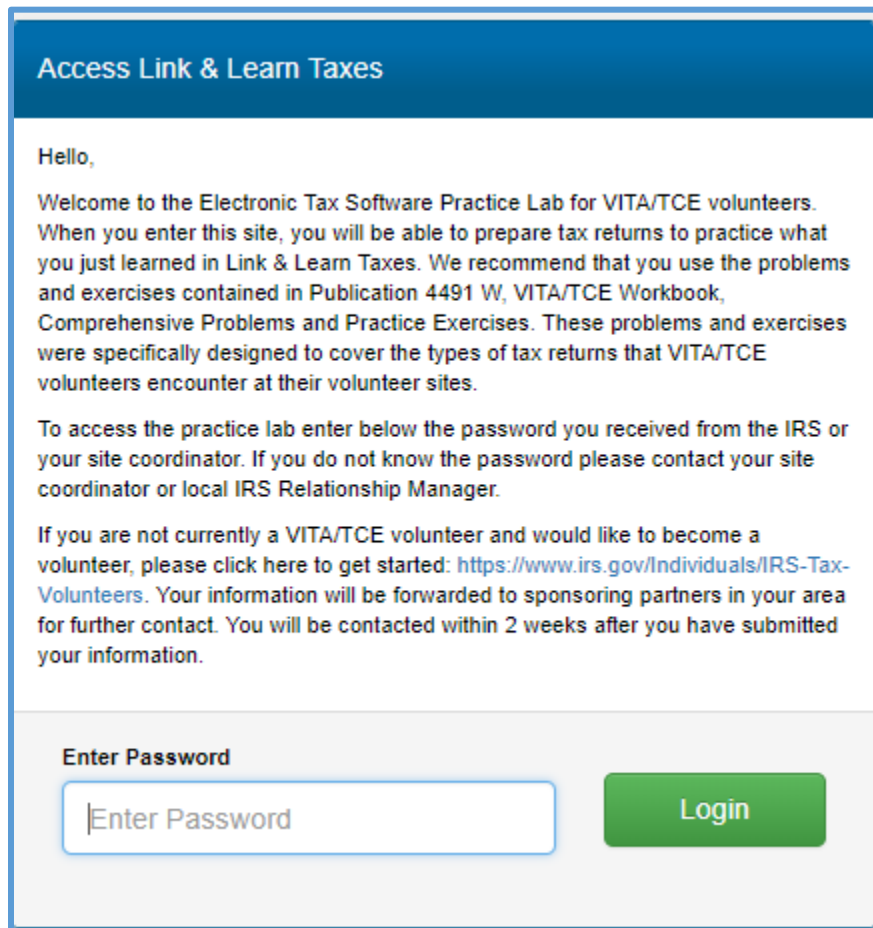
TaxSlayer provides an environment in which you can prepare training returns. When you work in the IRS Practice Lab, you can practice in TaxSlayer Pro Online to be fully prepared for tax season. Take the courses in Link & Learn Taxes, and then practice preparing returns.

Creating a Login

Before you can start working in the IRS Practice Lab, you need to create a login. To create a login, use the following steps:

1. Navigate to the IRS Practice Lab in your browser:
<https://vita.taxslayerpro.com/IRSTraining>.

Your browser displays the IRS Practice Lab page:



The screenshot shows a web page titled "Access Link & Learn Taxes". The page content includes a greeting, a welcome message for VITA/TCE volunteers, instructions on how to access the practice lab using a password, and a link for new volunteers. At the bottom, there is a login form with a text input field labeled "Enter Password" and a green "Login" button.

Access Link & Learn Taxes

Hello,

Welcome to the Electronic Tax Software Practice Lab for VITA/TCE volunteers. When you enter this site, you will be able to prepare tax returns to practice what you just learned in Link & Learn Taxes. We recommend that you use the problems and exercises contained in Publication 4491 W, VITA/TCE Workbook, Comprehensive Problems and Practice Exercises. These problems and exercises were specifically designed to cover the types of tax returns that VITA/TCE volunteers encounter at their volunteer sites.

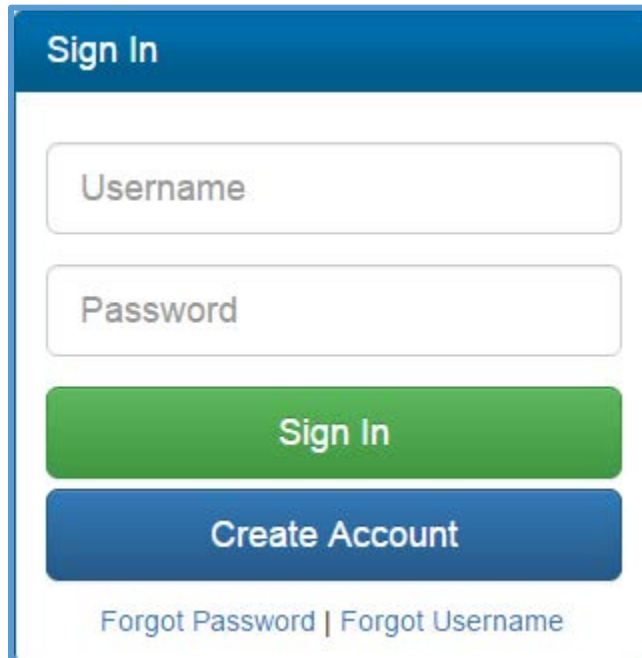
To access the practice lab enter below the password you received from the IRS or your site coordinator. If you do not know the password please contact your site coordinator or local IRS Relationship Manager.

If you are not currently a VITA/TCE volunteer and would like to become a volunteer, please click here to get started: <https://www.irs.gov/Individuals/IRS-Tax-Volunteers>. Your information will be forwarded to sponsoring partners in your area for further contact. You will be contacted within 2 weeks after you have submitted your information.

Enter Password

2. Find the generic password that your IRS Relationship Manager or Site Coordinator provides.
3. Type the password.
4. Click **Login**.

IRS Practice Lab displays the **Sign In** page:



Sign In

Username

Password

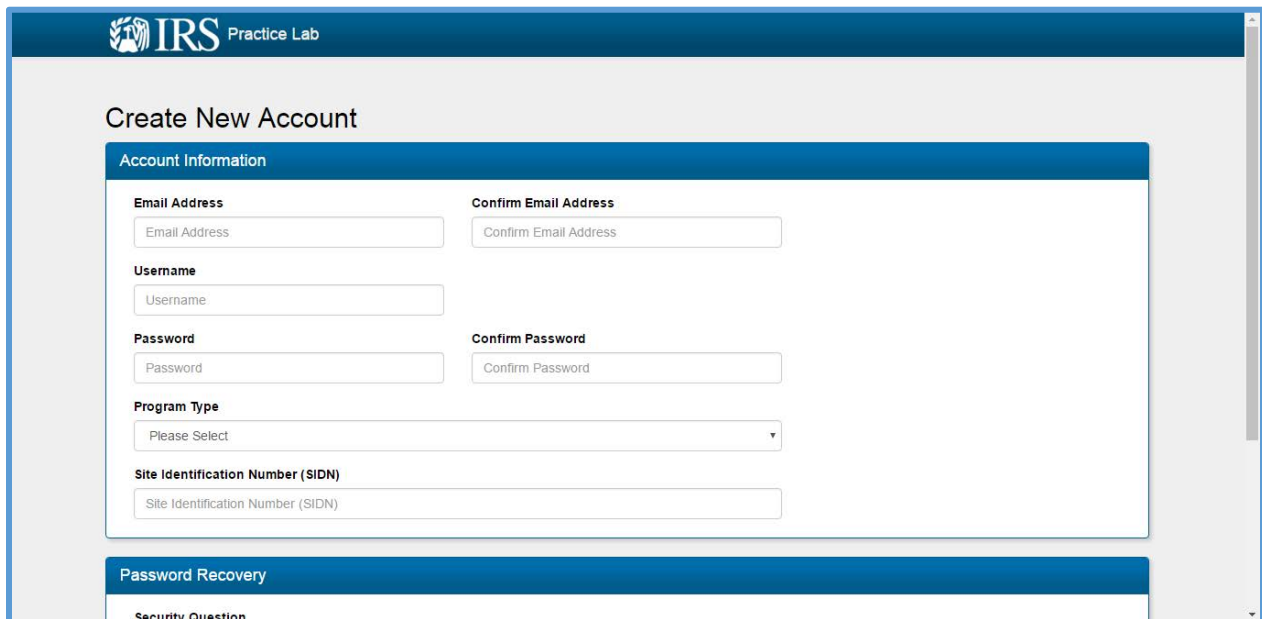
Sign In

Create Account

[Forgot Password](#) | [Forgot Username](#)

5. Click **Create Account**.

IRS Practice Lab displays the **Create New Account** page:



IRS Practice Lab

Create New Account

Account Information

Email Address:

Confirm Email Address:

Username:

Password:

Confirm Password:

Program Type:

Site Identification Number (SIDN):

Password Recovery

Security Question:

6. In the **Account Information** section, type your email address.

TIP: IRS Practice Lab displays a warning if you have already set up the email address in the Practice Lab system. Make sure you use a unique

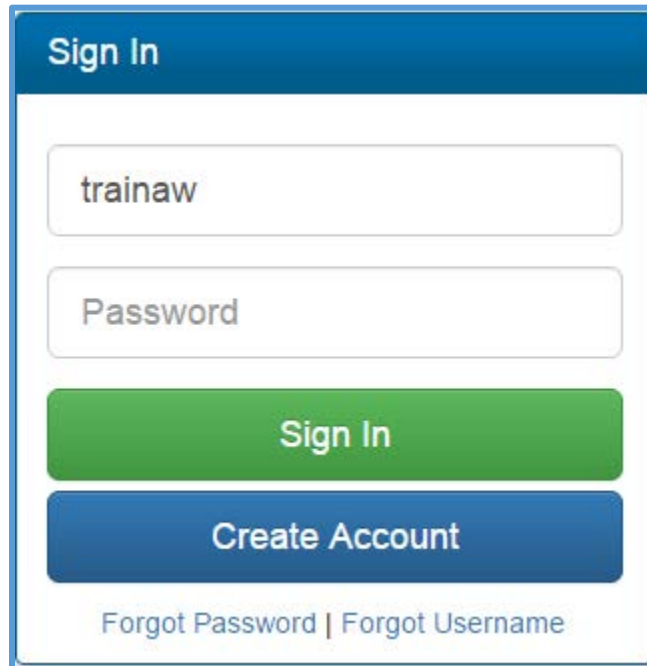
email address. If you have already set up a user name on the system, and do not remember it, see the *Retrieving a User Name* section in this lesson.

7. Type the email address again for verification.
8. Create a user name. We recommend that you use either *Train* or *Practice* in the user name.

TIP: You must create a unique user name. IRS Practice Lab displays a warning if the user name has been created by another volunteer. Do not use a user name that your site administrator may use for your user name on the live TaxSlayer Pro Online site later.

9. Type a password. Use an alphanumeric password containing at least fifteen (15) characters and a maximum of twenty-five (25) characters. Include at least one uppercase letter, one lowercase letter, one number and one special character (@ \$! % * ? &).
10. Type the password again for verification.
11. Select the program type from the drop-down list. You can select one of the following options:
 - a. VITA
 - b. Military VITA
 - c. Co-Located VITA
 - d. TCE (Non-AARP)
 - e. Grant
 - f. AARP Tax-Aide
 - g. FSA Fusion
 - h. FSA Stand-Alone
 - i. FSA Remote
 - j. IRS Employee
 - k. None
12. Type your Site Identification Number (SIDN).
13. Select a security question from the list.
14. Type the answer to your security question.
15. Click **Create Account**.

Practice Lab displays the **Sign In** page with your new user name entered:



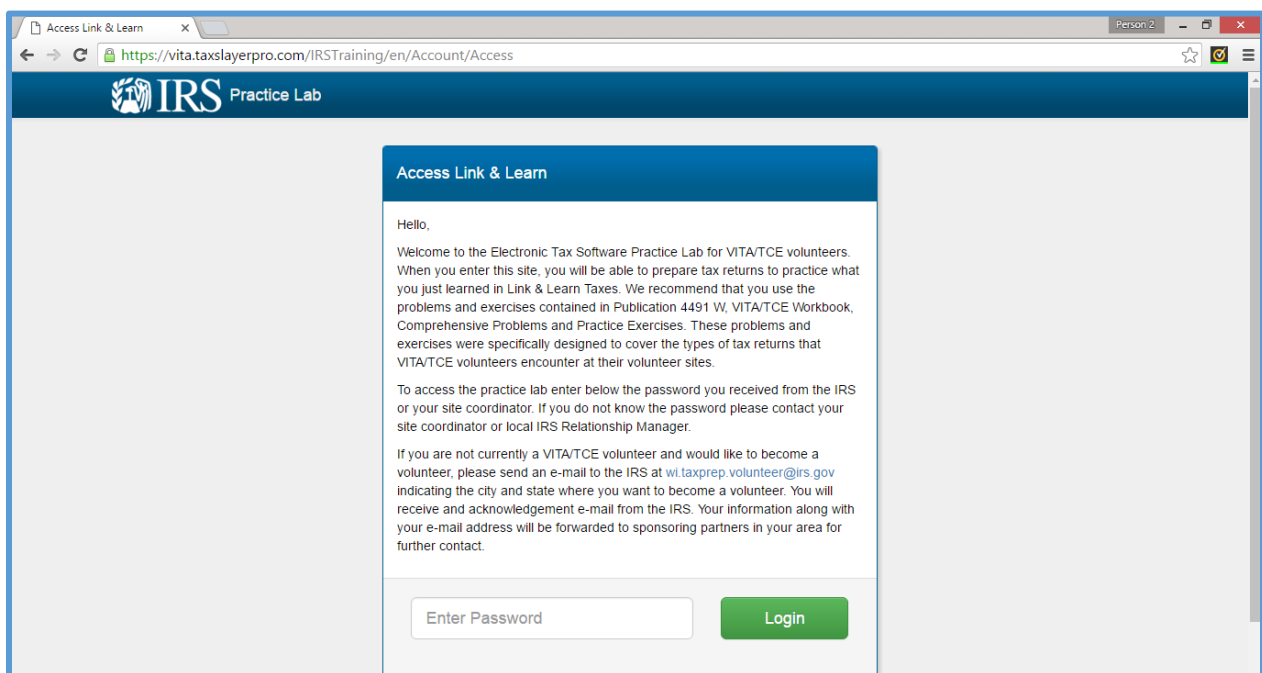
The image shows a 'Sign In' form with a blue header. Below the header is a text input field containing 'trainaw'. Underneath is a 'Password' label with a corresponding input field. There are two buttons: a green 'Sign In' button and a blue 'Create Account' button. At the bottom, there are links for 'Forgot Password' and 'Forgot Username'.

Signing In

To sign in to Practice Lab, use the following steps:

1. In your browser, navigate to <https://vita.taxslayerpro.com/IRSTraining>.

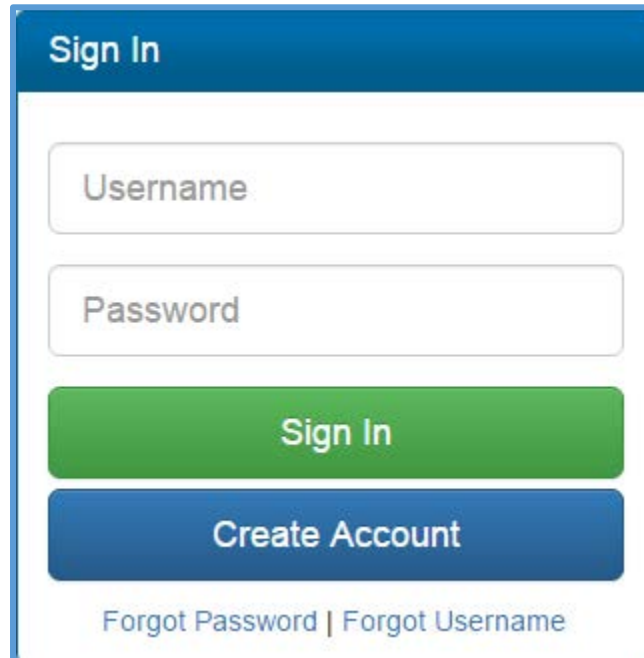
Your browser displays the IRS Practice Lab page:



The image shows a browser window displaying the IRS Practice Lab page. The URL is <https://vita.taxslayerpro.com/IRSTraining/en/Account/Access>. The page features the IRS logo and the text 'Practice Lab'. A central box titled 'Access Link & Learn' contains a welcome message and instructions for users. At the bottom of this box, there is an 'Enter Password' input field and a green 'Login' button.

1. Find the generic password that your IRS Relationship Manager or Site Coordinator provides.
2. Type the password.
3. Click **Login**.

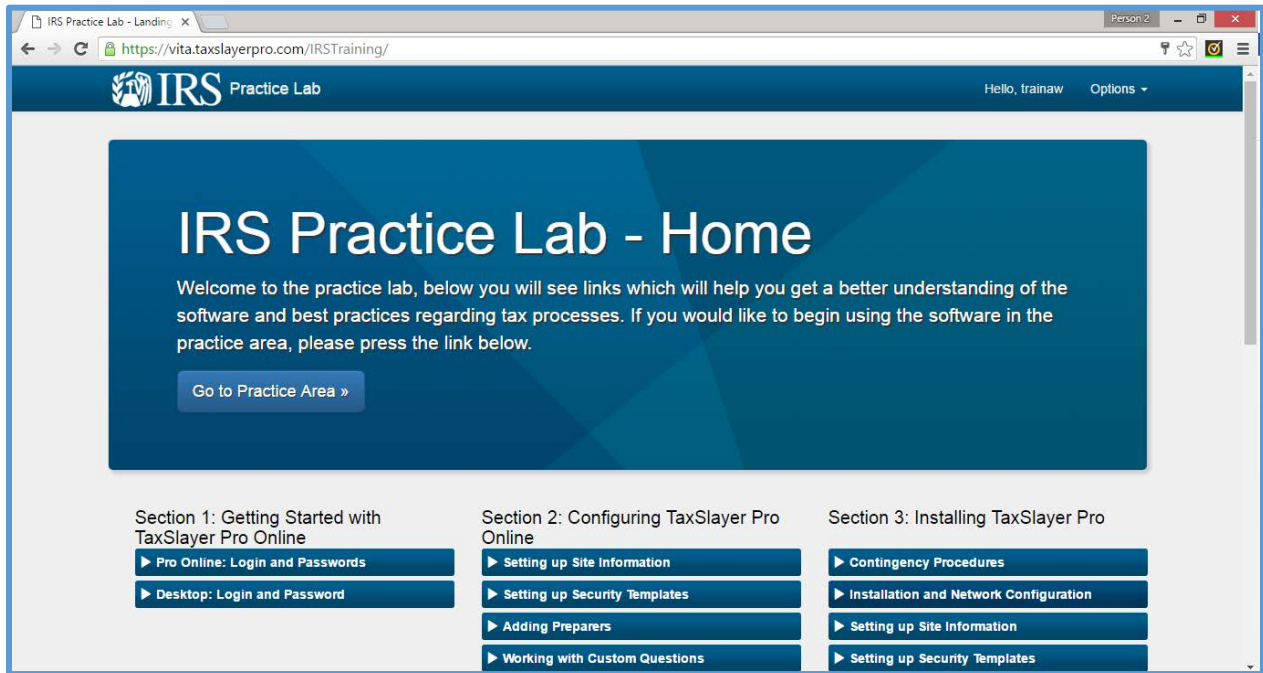
Practice Lab displays the **Sign In** page:



The image shows a 'Sign In' form with a blue header. Below the header are two input fields: 'Username' and 'Password'. Underneath these fields are two buttons: a green 'Sign In' button and a blue 'Create Account' button. At the bottom of the form, there are two links: 'Forgot Password' and 'Forgot Username'.

2. Type your user name and password.
3. Click **Sign In**.

Practice Lab displays the **IRS Practice Lab – Home** page:

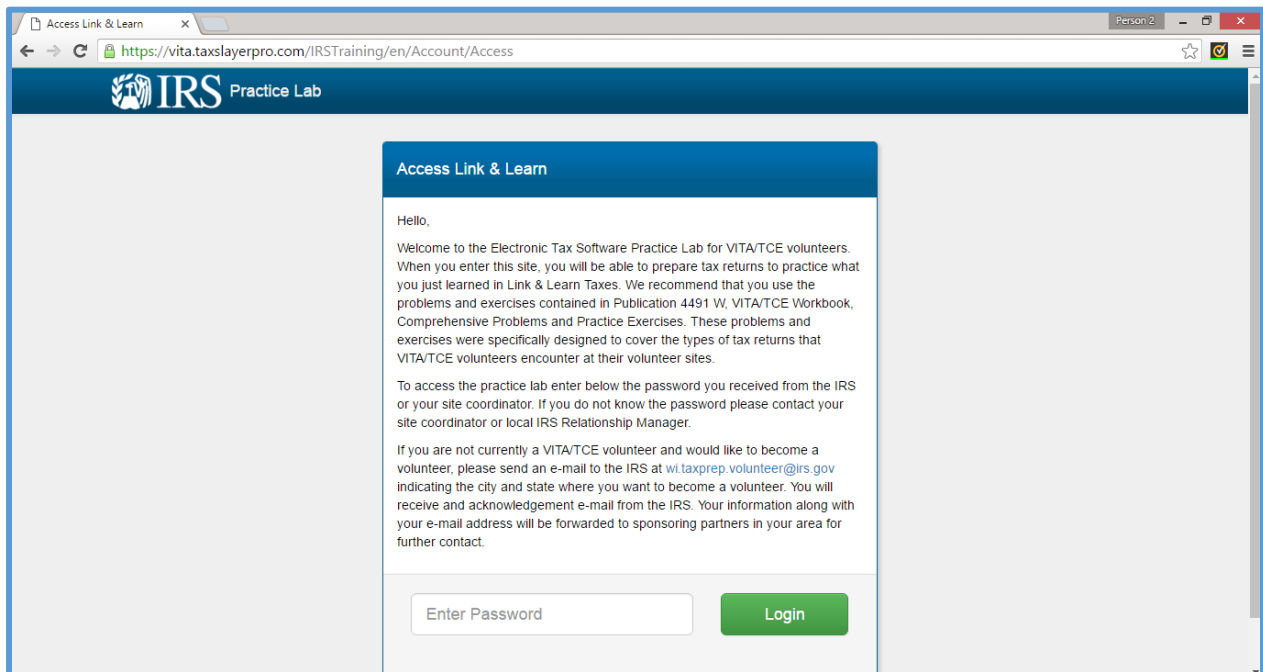


Retrieving a User Name

If you forget your user name, you need to retrieve it. To do so, use the following steps:

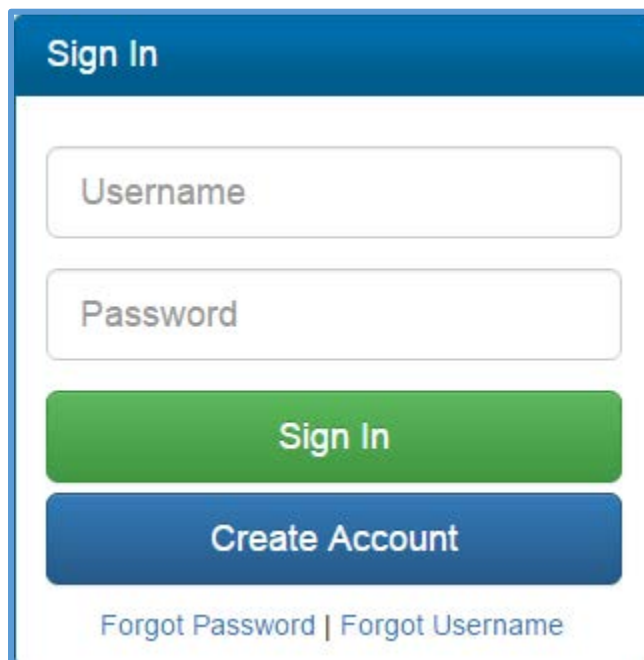
1. In your browser, navigate to <https://vita.taxslayerpro.com/IRSTraining>.

Your browser displays the IRS Practice Lab page:



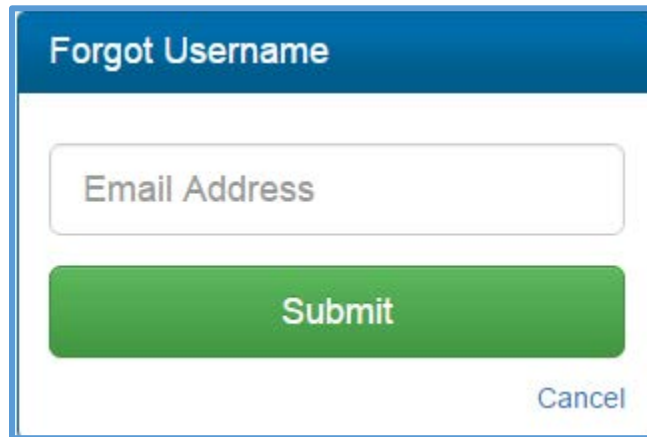
4. Find the generic password that your IRS Relationship Manager or Site Coordinator provides.
5. Type the password.
6. Click **Login**.

Practice Lab displays the **Sign In** page:



7. Click **Forgot Username**.

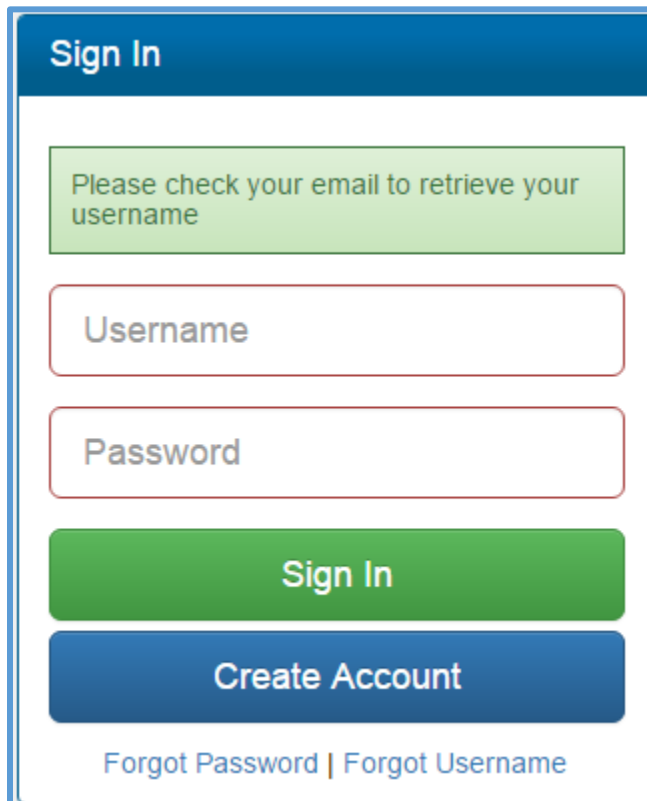
IRS Practice Lab displays the **Forgot Username** page:



8. Type the email address you used to set up the IRS Practice Lab account.

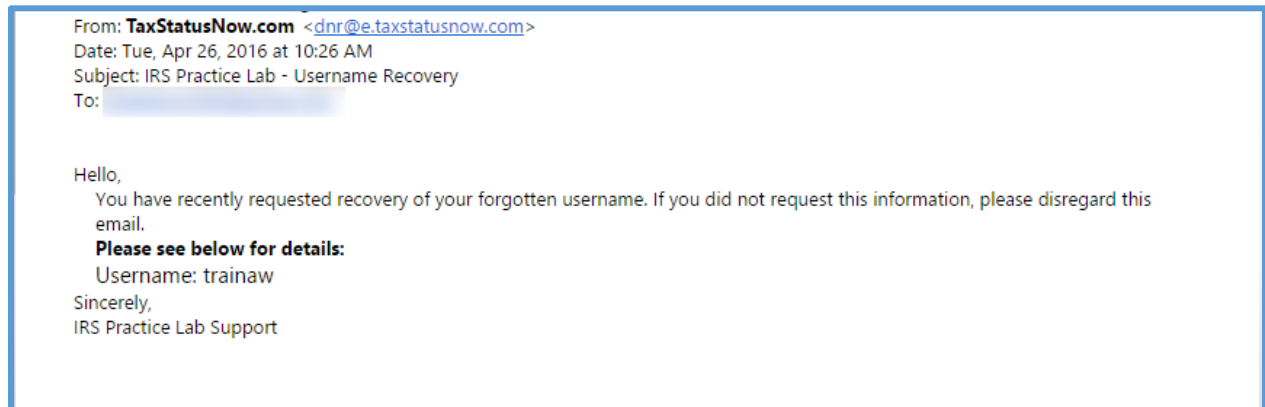
9. Click **Submit**.

IRS Practice Lab displays the **Sign In** page, with a message that you should check your email for the user name:



10. Find the email from TaxStatusNow.com.

Your email service displays the email:



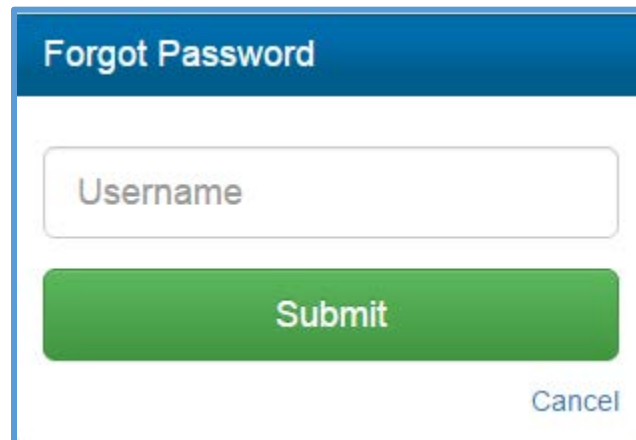
11. Use the user name in the email to sign in to IRS Practice Lab.

Resetting Your Password

If you forget your password, use the following steps from the **Sign In** page:

1. Click **Forgot Password**.

IRS Practice Lab displays the **Forgot Password** page:



The screenshot shows a web form titled "Forgot Password" with a blue header. Below the header is a text input field labeled "Username". Below the input field is a large green button labeled "Submit". In the bottom right corner of the form area, there is a "Cancel" link.

2. Type your user name.
3. Click **Submit**.

IRS Practice Lab displays the Forgot Password page with your secret question:

Forgot Password

In what city were you born?

Submit


[Forgot Answer](#) [Cancel](#)


4. Type the answer to your secret question.
5. Click **Submit**.

IRS Practice Lab displays the **Forgot Password** page to create a new password:

Forgot Password

Password must contain a minimum of 15 and maximum of 25 characters at least 1 Uppercase Alphabet, 1 Lowercase Alphabet, 1 Number and 1 Special Character (@\$!*?&)

Password 

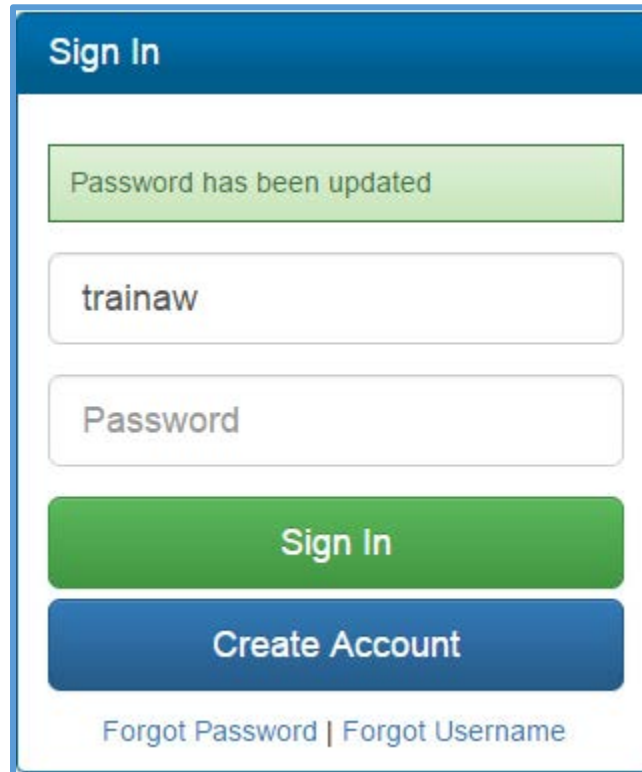
Confirm Password 

Submit

[Cancel](#)

6. Type a new password.
7. Confirm the password.
8. Click **Submit**.

IRS Practice Lab displays the **Sign In** page with a message that your password has been updated:



The screenshot shows a 'Sign In' page with a blue header. Below the header is a green message box that says 'Password has been updated'. Underneath are two input fields: the first contains the text 'trainaw' and the second is labeled 'Password'. Below the input fields are two buttons: a green 'Sign In' button and a blue 'Create Account' button. At the bottom of the form, there are links for 'Forgot Password' and 'Forgot Username'.

Forgot Answer

If you forget the answer to your secret question, you can still reset your password. Use the following steps:

1. Follow the steps above to reach the **Forgot Password** page with your secret question.

IRS Practice Lab displays the **Forgot Password** page with your security question:



Forgot Password

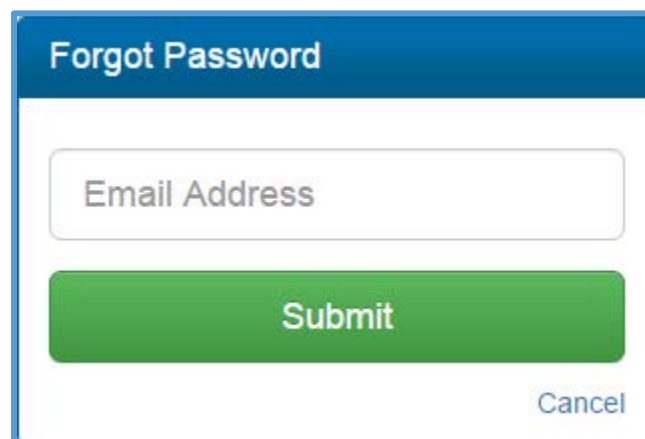
In what city were you born?

Submit

[Forgot Answer](#) [Cancel](#)

2. Click **Forgot Answer**.

IRS Practice Lab displays the **Forgot Password** page for your email address:



Forgot Password

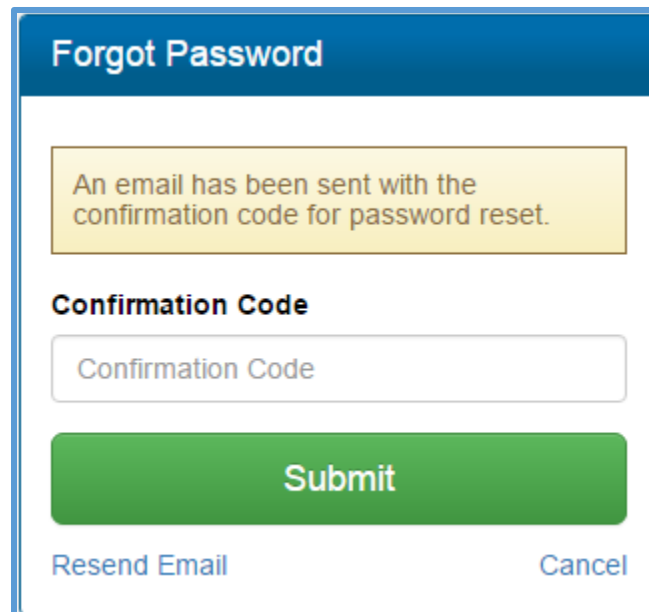
Submit

[Cancel](#)

3. Type your email address.

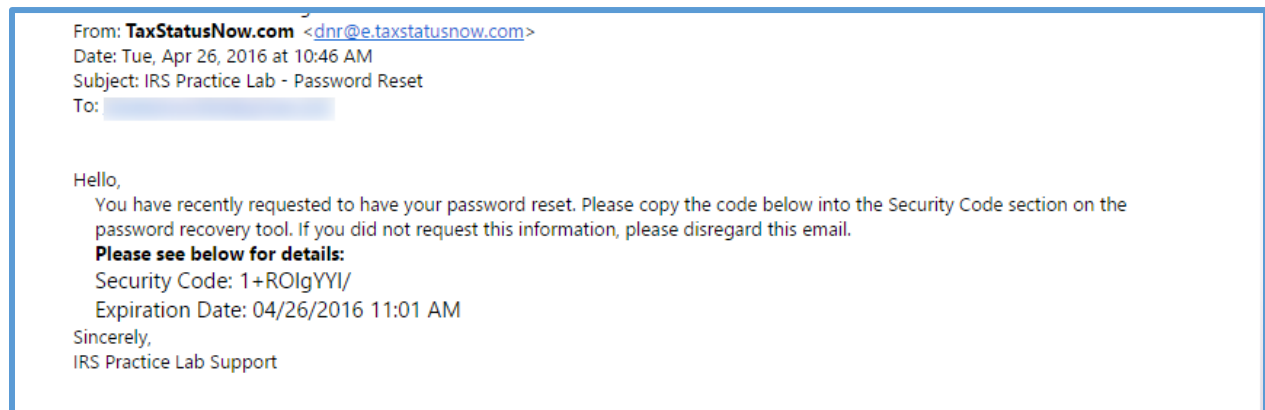
4. Click **Submit**.

IRS Practice Lab displays the **Forgot Password** page for your confirmation code:



5. Find the email from TaxStatusNow.com.

Your email service displays the email:




6. Type the security/confirmation code from the email on the **Forgot Password** page.


7. Click **Submit**.

IRS Practice Lab displays the **Forgot Password** page to create a new password:

Forgot Password

Password must contain a minimum of 15 and maximum of 25 characters at least 1 Uppercase Alphabet, 1 Lowercase Alphabet, 1 Number and 1 Special Character (@\$!%*?&)

Password 

Confirm Password 

Submit

[Cancel](#)

8. Type a new password.
9. Confirm the password.
10. Click **Submit**.

IRS Practice Lab displays the **Sign In** page with a message that your password has been updated:

Sign In

Password has been updated

trainaw

Password

Sign In

Create Account

[Forgot Password](#) | [Forgot Username](#)

Using the Practice Lab

After you log in, you can take the lessons on this page:

IRS Practice Lab

Hello, trainaw Options

IRS Practice Lab - Home

Welcome to the practice lab, below you will see links which will help you get a better understanding of the software and best practices regarding tax processes. If you would like to begin using the software in the practice area, please press the link below.

[Go to Practice Area »](#)

Section 1: Getting Started with TaxSlayer Pro Online

- ▶ Pro Online: Login and Passwords
- ▶ Desktop: Login and Password

Section 2: Configuring TaxSlayer Pro Online

- ▶ Setting up Site Information
- ▶ Setting up Security Templates
- ▶ Adding Preparers
- ▶ Working with Custom Questions

Section 3: Installing TaxSlayer Pro Online

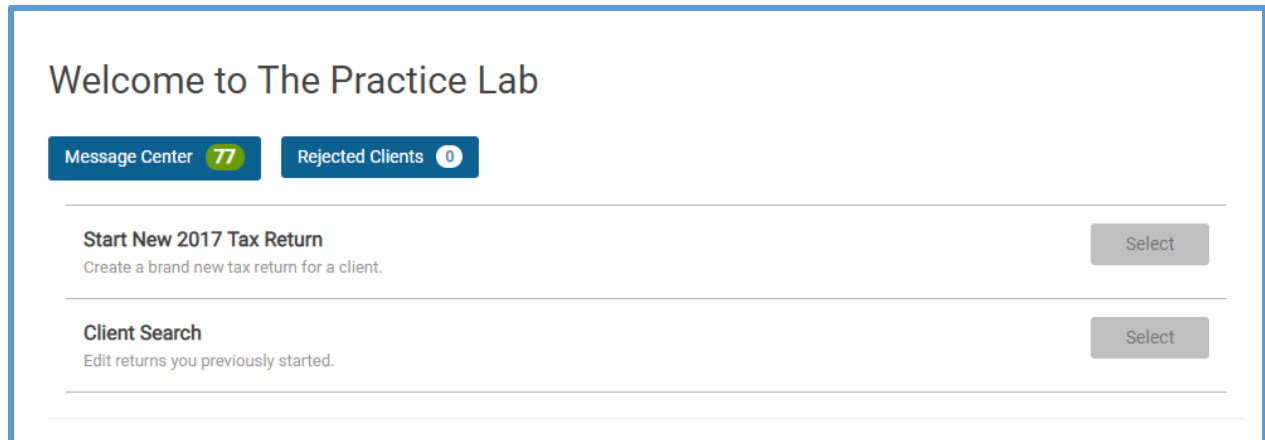
- ▶ Contingency Procedures
- ▶ Installation and Network Configuration
- ▶ Setting up Site Information
- ▶ Setting up Security Templates

Preparing Practice Returns

When you are ready to practice preparing returns, use the following steps:

1. Click **Go to Practice Area**.

IRS Practice Lab displays the **Welcome to Practice Lab** page:



On the **Welcome to Practice Lab** page, you can access the **Start New Tax Return** and **Client Search** features. This page has the same appearance and functionality as the live TaxSlayer Pro Online **Welcome** page. Do **not** prepare live returns on the IRS Practice Lab. You should only use this site for practice returns.

2. Click **Select** on the **Start New Tax Return** line.

IRS Practice Lab displays the **Available Taxpayer Profiles** page:

Available Taxpayer Profiles

- Basic (No Profile)**
Create a return without a Taxpayer Profile.
- RETIREMENT
- ITEMIZED DEDUCTIONS
- RENTAL PROPERTY
- Master Profile
IRS Guidelines: This profile will automatically display the following input screens after the personal information has been completed: Form W-2, 1099-R, 1099-INT, 1099-DIV, 1099-B, SSA-1099.

Enter Social Security Number

3. Select a taxpayer profile.
4. Click **Enter Social Security Number**.

TIP: TaxSlayer defaults the fourth and fifth digits to 00. The Social Security Administration does not use these numbers in those places for live Social Security numbers, so this ensures that you create a practice Social Security number. For example, you can use *111-00-1234*.

5. Click **Start Return**.

IRS Practice Lab displays the **What's your filing status?** page:

What's your filing status?

Single

Married Filing Joint

Married Filing Separate

Head of Household

Qualifying Widow(er) with Dependent Children

Nonresident Alien

Need help determining your filing status?

FILING STATUS WIZARD

BACK

CONTINUE

6. Complete the return as described in the *Preparing a Tax Return* lessons. Use the problems and exercises in IRS Publication 4491W, *VITA/TCE Workbook, Comprehensive Problems and Practice Exercises*.

You can prepare and print a return just as you can on the TaxSlayer Pro Online site, with the exception of the following:

- You can mark a return for review. However, reviewers cannot review returns. When you mark the return for review and save the return, the return is complete for purposes of the IRS Practice Lab.
- You cannot electronically file a return.
- If your site will use Consent to Use and Consent to Disclose statements, you do not see them in the process in the IRS Practice Lab.

Using the Office Client List

When you complete returns, you can search for an existing taxpayer and view information about that taxpayer, just as you will in TaxSlayer Pro Online. To do so, use the following steps from the **Welcome to Practice Lab** page:

1. Click **Select** on the **Client Search** line.

IRS Practice Lab displays the **Office Client List** page:

Filter by Status: Any Status

Filter by Return Tag: Any Tag

Do Not Show Deactivated Returns

Do Not Show Accepted Returns

Date From: yyyy/mm/dd

Date To: yyyy/mm/dd

Date Type: Create Date

Search Client List

Show 10 entries

Showing 1 to 10 of 17 entries

Previous 1 2 Next

SSN	FIRST	LAST	PHONE	PREPARER	STATUS	
XXX-XX-1234	PRACTICE	LAB	(706) 222-3222	IRS Preparer	In Progress	Tools Select

2. You can filter by the return tag or search the client list. However, all returns in this list are in progress, so you can only filter by that status.
3. You can add notes, view/edit return tags, or print the return, just as described in the TaxSlayer Pro Online lessons.
4. If you want to view the client status, select **Client Status** from the **Tools** drop-down list.

IRS Practice Lab displays the **Client Status** page:

Return Access History
No Return Access History Available

Client Return Audit History

Action Taken - EfileSaved	Return Information -
Username - Kimpractice29	Filing Status - 1
Log Time - 12/6/20 12:41:13 PM	AGI - 46100
Preparer - IRS Preparer	Amount Due - 393.00
Ero - Practice Lab	Return Type - Paper Return
SSN - 500001206	Return Fees -
States on Return -	

Action Taken - CreateReturn	Return Information -
Username - Kimpractice29	Filing Status -
Log Time - 12/6/20 12:32:11 PM	AGI - 0
Preparer - IRS Preparer	Return Fees -
Ero - Practice Lab	
SSN - 500001206	
States on Return -	

5. On this page, you can view the client's information and return history. Remember, you cannot e-file returns in IRS Practice Lab, so you cannot view transmission information.

Index

Address, 5, 6, 11, 15
Client Status, 22, 23
Consent to Disclose, 21
Consent to Use, 21
e-file, 23
Filing status, 21
Notes, 22
Office Client List, 21, 22
Password, 4, 6, 8, 10, 12, 13, 14, 15, 16, 17, 18
Print, 21, 22
Reset, 14
Return tags, 22
Review, 21
Security Question, 6, 15
SIDN, 6
Site administrator, 6
Taxpayer Profile, 20
User name, 6, 7, 8, 9, 11, 12