



VITA/TCE Training

Practice Lab

Using the Practice Lab

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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.

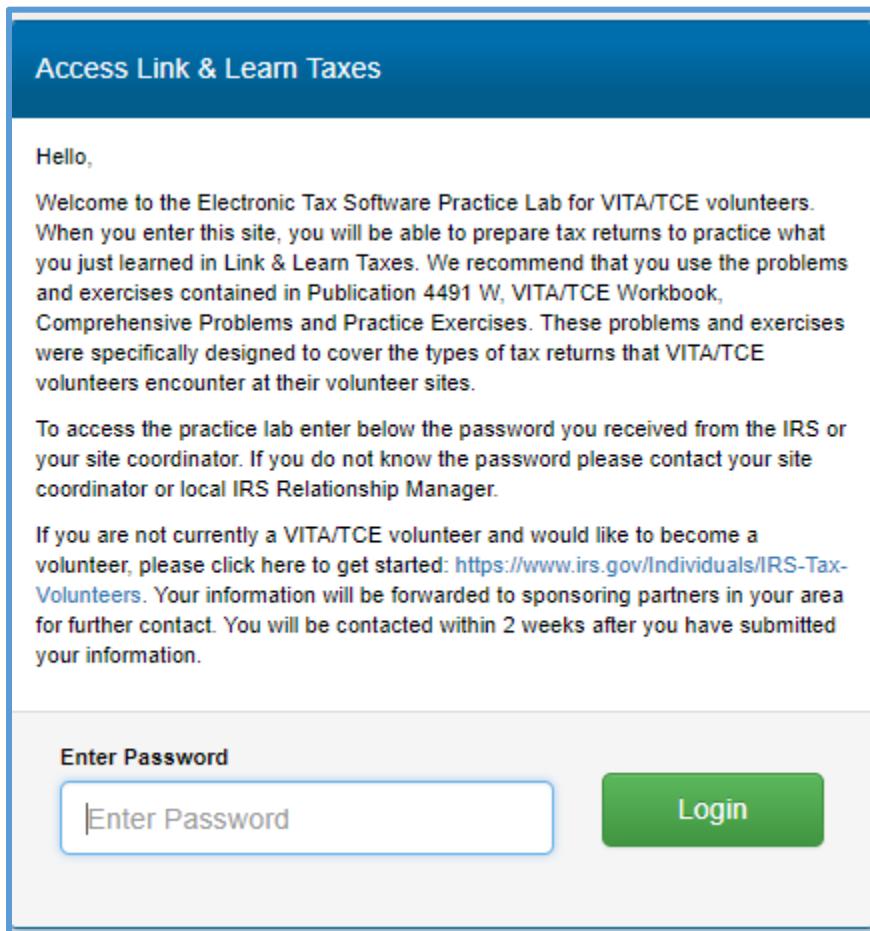
TaxSlayer provides an environment in which you can prepare training returns. When you work in the IRS Practice Lab, you can practice in TaxSlayer Pro Online to be fully prepared for tax season. Take the courses in Link & Learn Taxes, and then practice preparing returns.

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 is as follows:

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.

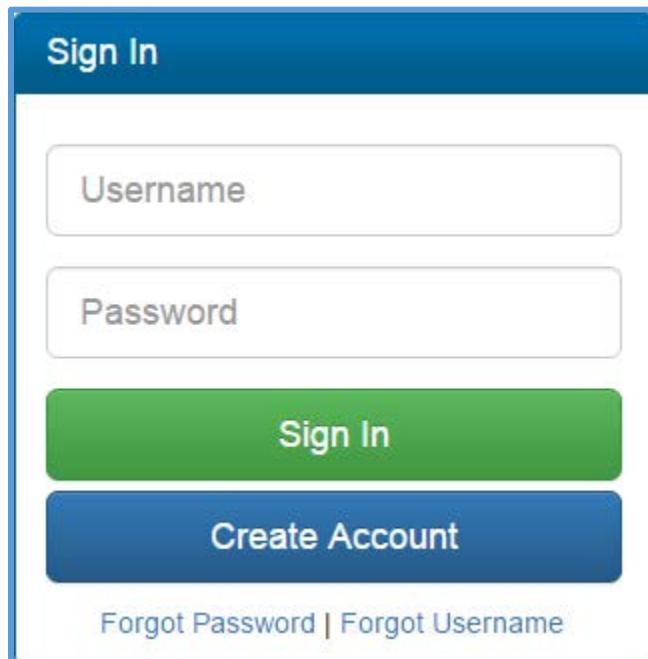
If you are not currently a VITA/TCE volunteer and would like to become a volunteer, please click here to get started: <https://www.irs.gov/Individuals/IRS-Tax-Volunteers>. Your information will be forwarded to sponsoring partners in your area for further contact. You will be contacted within 2 weeks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

Enter Password

Login

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

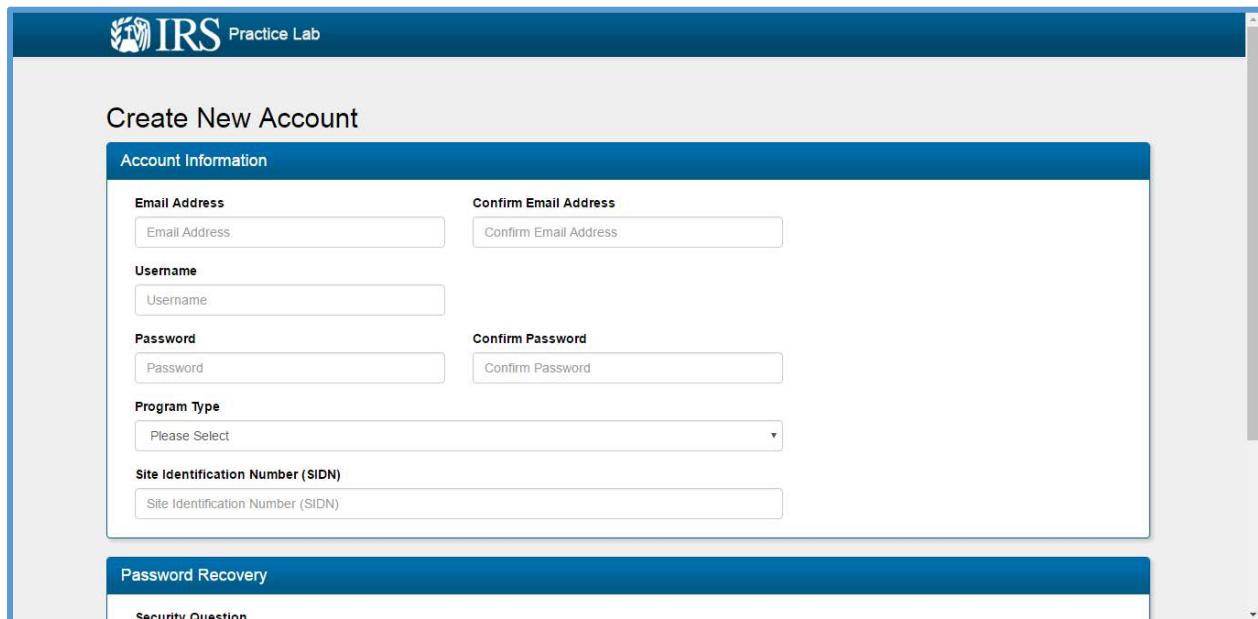
IRS Practice Lab displays the **Sign In** page:



The image shows the 'Sign In' page of the IRS Practice Lab. The page has a blue header with the word 'Sign In'. Below the header are two input fields: 'Username' and 'Password'. Underneath these fields is a large green 'Sign In' button. Below the button is a blue 'Create Account' button. At the bottom of the page are two links: 'Forgot Password' and 'Forgot Username'.

5. Click **Create Account**.

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



The image shows the 'Create New Account' page of the IRS Practice Lab. The page has a blue header with the IRS logo and the text 'Practice Lab'. Below the header is a section titled 'Create New Account'. This section is divided into two main parts: 'Account Information' and 'Password Recovery'. The 'Account Information' section contains fields for 'Email Address' (with 'Email Address' and 'Confirm Email Address' inputs), 'Username' (with 'Username' and 'Confirm Password' inputs), 'Password' (with 'Password' and 'Confirm Password' inputs), 'Program Type' (a dropdown menu with 'Please Select' option), and 'Site Identification Number (SIDN)' (with a 'Site Identification Number (SIDN)' input). Below the 'Account Information' section is a 'Password Recovery' section, which includes a 'Security Question' field.

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

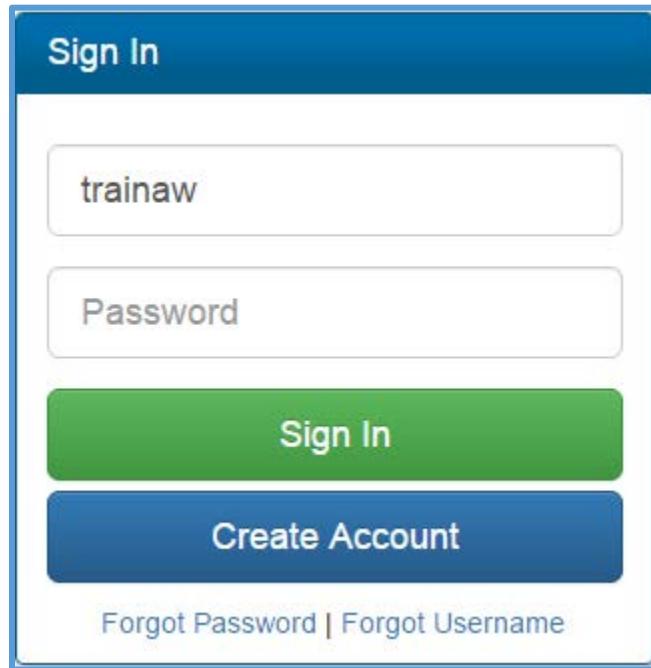
email address. If you have already set up a user name on the system, and do not remember it, see the *Retrieving a User Name* section in this lesson.

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:



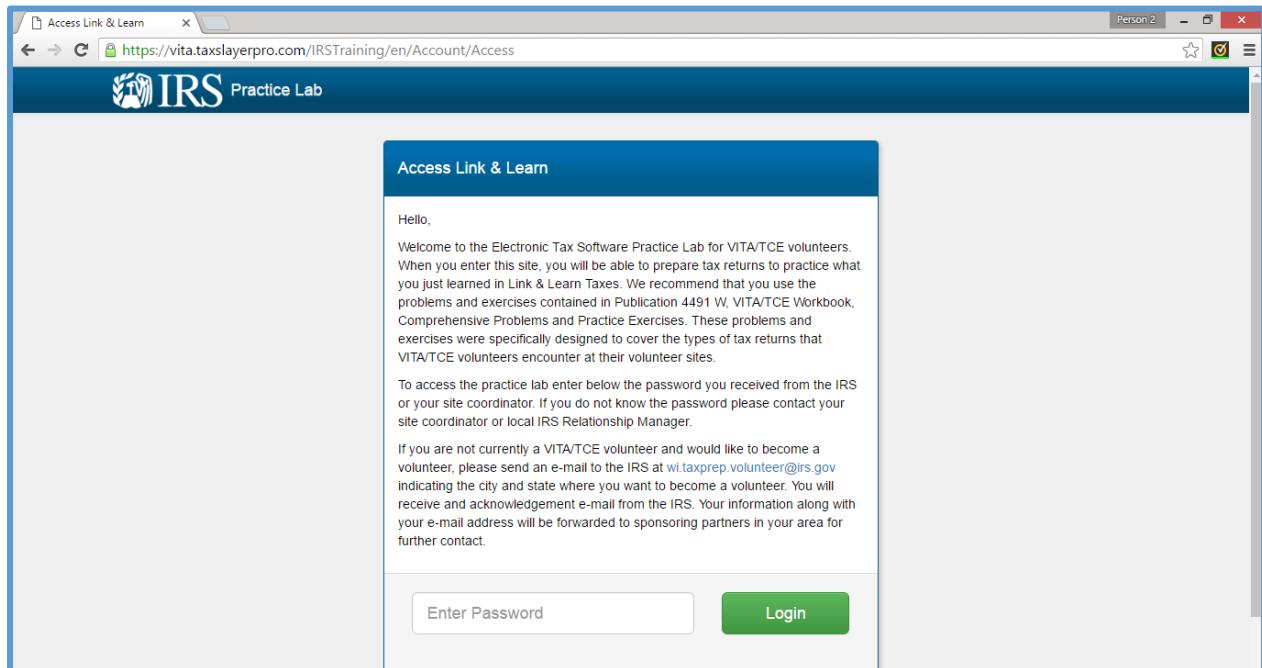
The image shows a 'Sign In' page. At the top, the word 'Sign In' is displayed in white on a dark blue header. Below the header are two input fields: the top one contains the text 'trainaw' and the bottom one is labeled 'Password'. Below these fields is a large green button with the text 'Sign In' in white. Underneath the green button is a blue button with the text 'Create Account' in white. At the bottom of the page, there are two links: '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 web browser window displaying the IRS Practice Lab page. The address bar shows the URL <https://vita.taxslayerpro.com/IRSTraining/en/Account/Access>. The page has a dark blue header with the IRS logo and 'Practice Lab' text. Below the header is a white content area with a dark blue header titled 'Access Link & Learn'. The content within this area is as follows:

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.

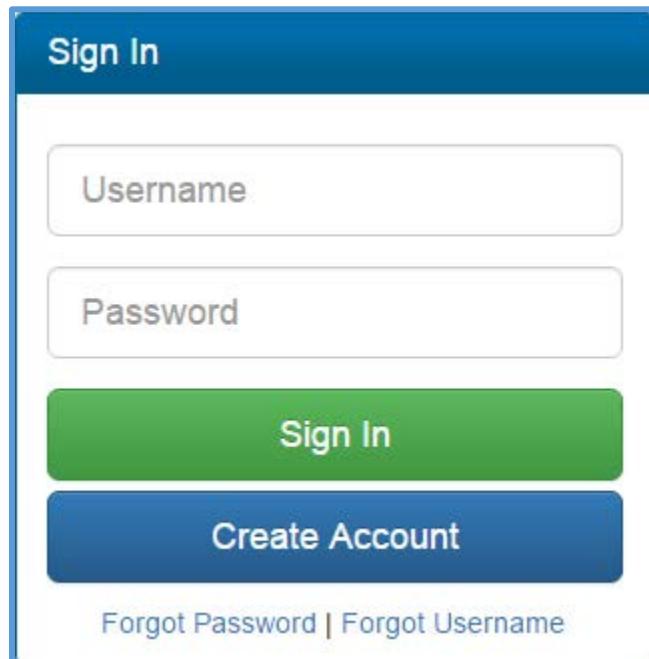
To access the practice lab enter below the password you received from the IRS or your site coordinator. If you do not know the password please contact your site coordinator or local IRS Relationship Manager.

If you are not currently a VITA/TCE volunteer and would like to become a volunteer, please send an e-mail to the IRS at vtaxprep.volunteer@irs.gov indicating the city and state where you want to become a volunteer. You will receive and acknowledgement e-mail from the IRS. Your information along with your e-mail address will be forwarded to sponsoring partners in your area for further contact.

At the bottom of the content area are two buttons: 'Enter Password' and 'Login'.

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:

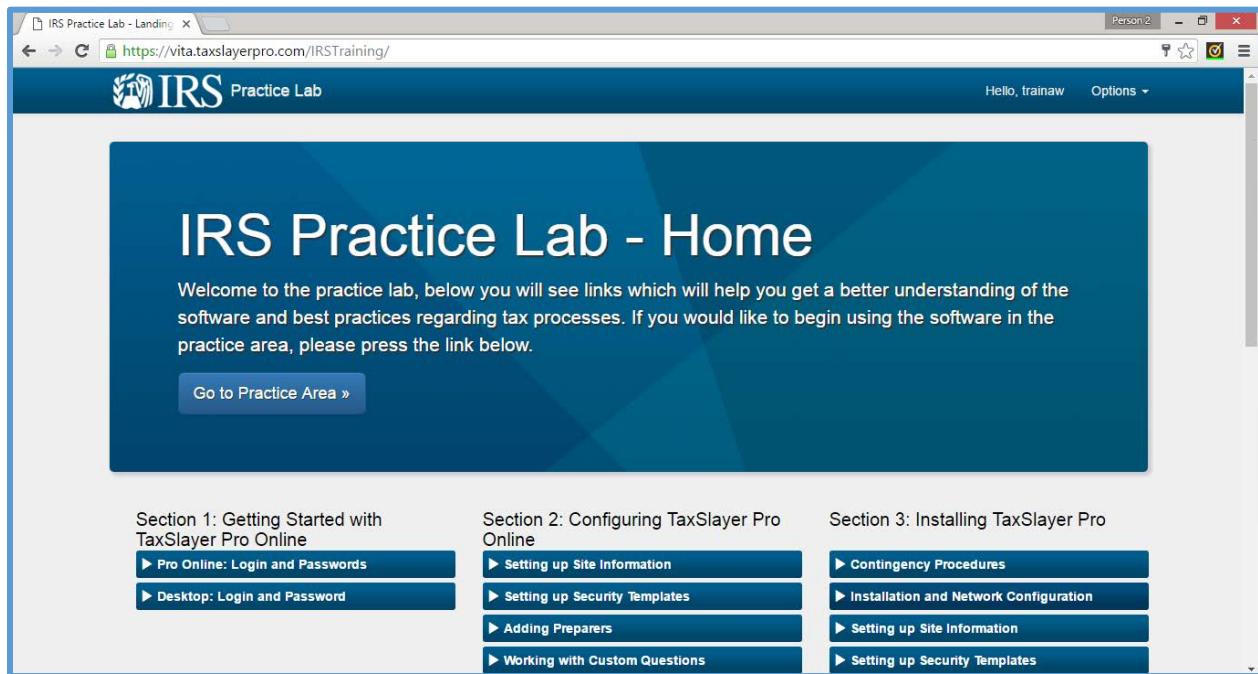


The image shows a 'Sign In' page with a blue header bar. Below the header are two input fields: 'Username' and 'Password', both with placeholder text. Underneath these fields is a large green 'Sign In' button with white text. Below the 'Sign In' button is a blue 'Create Account' button with white text. At the bottom of the page, there are two links: 'Forgot Password' and 'Forgot Username'.

Sign In	
Username	
Password	
Sign In	
Create Account	
Forgot Password Forgot Username	

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

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



The screenshot shows a web browser window titled 'IRS Practice Lab - Landing'. The URL in the address bar is <https://vita.taxslayerpro.com/IRSTraining/>. The page itself has a dark blue header with the IRS logo and 'Practice Lab'. Below the header is a large dark blue box containing the title 'IRS Practice Lab - Home' in white. A welcome message follows: '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.' Below this message is a blue button with the text 'Go to Practice Area »'. At the bottom of the page, there are three columns of links:

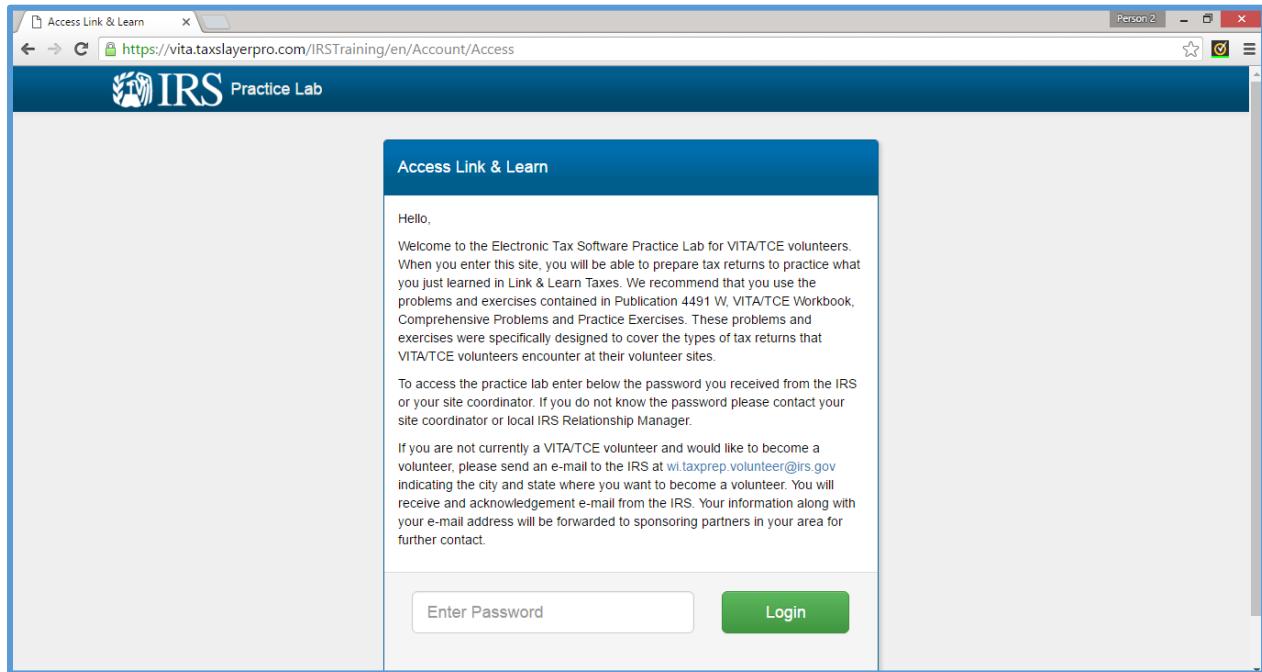
Section 1: Getting Started with TaxSlayer Pro Online	Section 2: Configuring TaxSlayer Pro Online	Section 3: Installing TaxSlayer Pro
▶ Pro Online: Login and Passwords	▶ Setting up Site Information	▶ Contingency Procedures
▶ Desktop: Login and Password	▶ Setting up Security Templates	▶ Installation and Network Configuration
	▶ Adding Preparers	▶ Setting up Site Information
	▶ Working with Custom Questions	▶ Setting up Security Templates

Retrieving a User Name

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

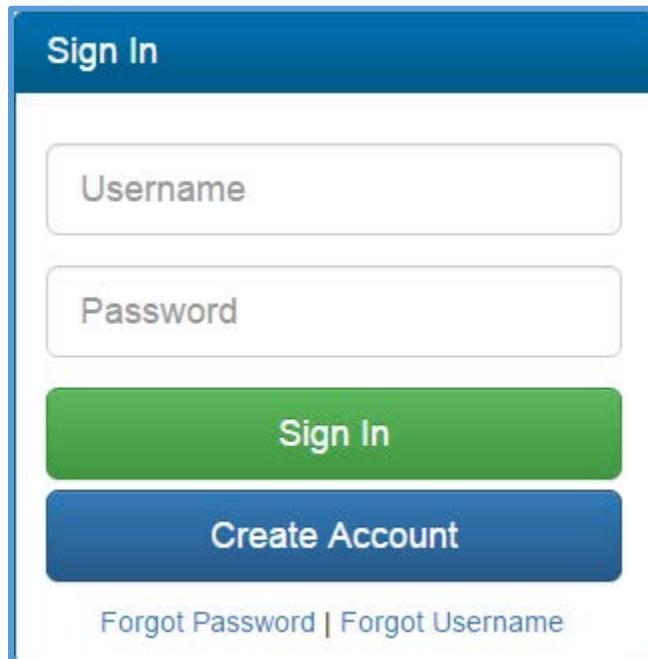
1. In your browser, navigate to <https://vita.taxslayerpro.com/IRSTraining>.

Your browser displays the IRS Practice Lab page:



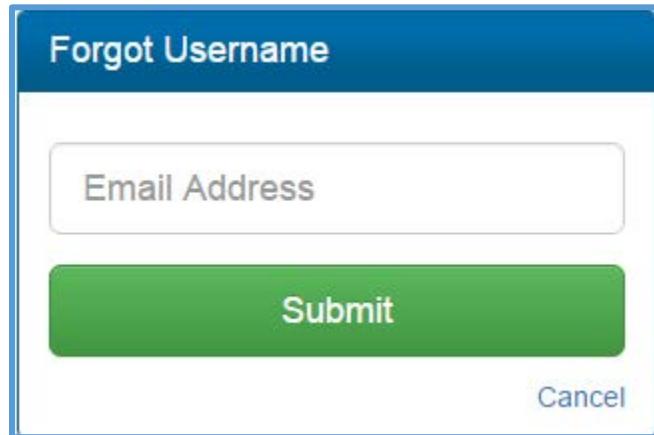
4. Find the generic password that your IRS Relationship Manager or Site Coordinator provides.
5. Type the password.
6. Click **Login**.

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



7. Click **Forgot Username**.

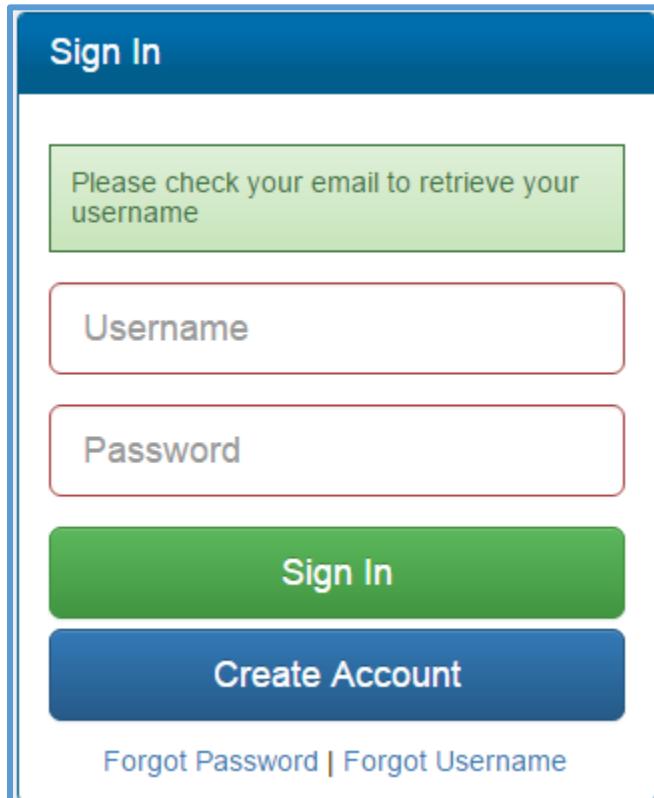
IRS Practice Lab displays the **Forgot Username** page:



The image shows a mobile-style interface for 'Forgot Username'. At the top, a blue header bar contains the text 'Forgot Username' in white. Below the header is a white input field with a rounded rectangular border, labeled 'Email Address' in a light gray font. Underneath the input field is a large green rectangular button with the word 'Submit' in white. In the bottom right corner of the white area, there is a small blue link labeled 'Cancel'.

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:



The image shows a 'Sign In' page. At the top, a blue header bar contains the text 'Sign In' in white. Below the header is a green rectangular box containing the text 'Please check your email to retrieve your username' in white. Below this box is a white input field with a rounded rectangular border, labeled 'Username' in a light gray font. Underneath the 'Username' field is another white input field with a rounded rectangular border, labeled 'Password' in a light gray font. Below the 'Password' field is a large green rectangular button with the text 'Sign In' in white. Underneath the 'Sign In' button is a blue rectangular button with the text 'Create Account' in white. At the bottom of the page, there is a small blue link labeled 'Forgot Password | Forgot Username'.

10. Find the email from TaxStatusNow.com.

Your email service displays the email:

From: **TaxStatusNow.com** <dnr@e.taxstatusnow.com>
Date: Tue, Apr 26, 2016 at 10:26 AM
Subject: IRS Practice Lab - Username Recovery
To: dnr@e.taxstatusnow.com

Hello,
You have recently requested recovery of your forgotten username. If you did not request this information, please disregard this email.
Please see below for details:
Username: trainaw
Sincerely,
IRS Practice Lab Support

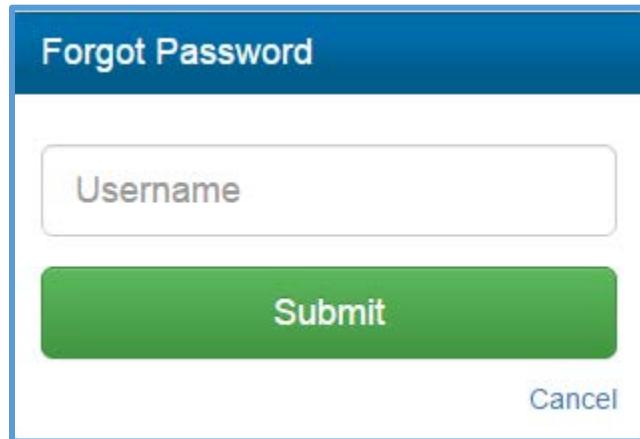
11. Use the user name in the email to sign in to IRS Practice Lab.

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 image shows a user interface for a 'Forgot Password' page. It has a dark blue header bar with the text 'Forgot Password' in white. Below the header is a light gray input field with the placeholder 'Username'. At the bottom of the page is a large green rectangular button with the word 'Submit' in white. In the bottom right corner of the page area, there is a small, faint 'Cancel' link.

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

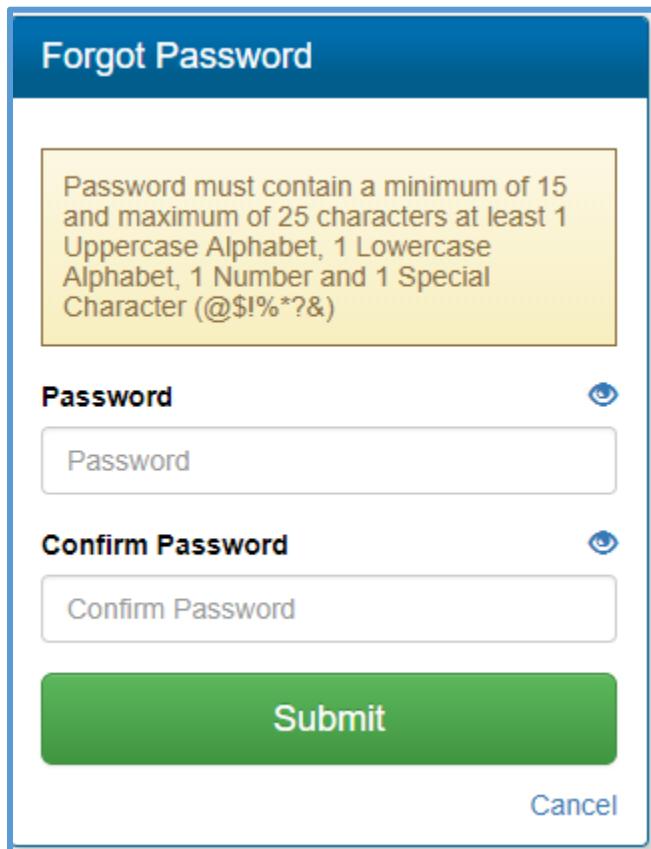
IRS Practice Lab displays the **Forgot Password** page with your secret question:



The image shows a mobile-style "Forgot Password" page. The title "Forgot Password" is at the top in a blue header. Below it is a question in red: "In what city were you born?". A light gray input field labeled "Answer" is below the question. A large green "Submit" button is centered below the input field. At the bottom, there are two links: "Forgot Answer" on the left and "Cancel" on the right.

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

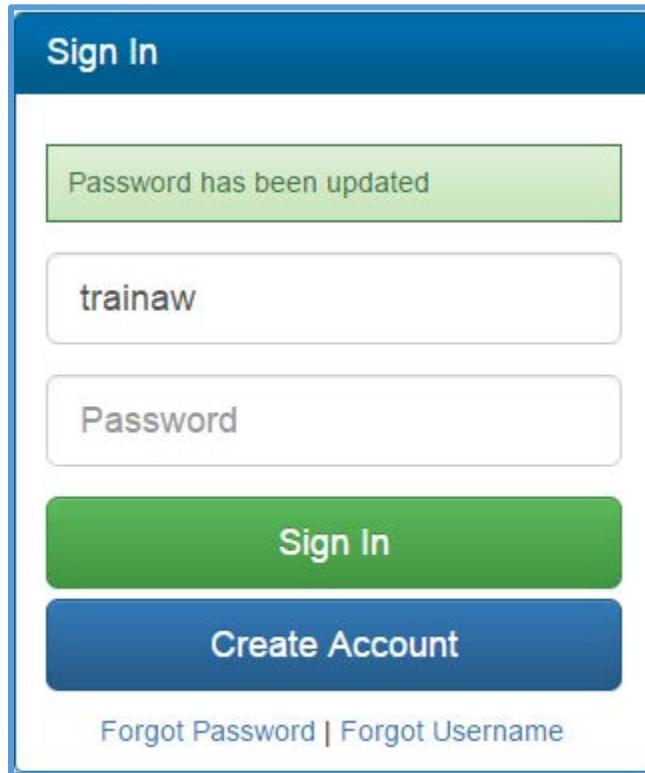
IRS Practice Lab displays the **Forgot Password** page to create a new password:



The image shows a mobile-style "Forgot Password" page. The title "Forgot Password" is at the top in a blue header. Below it is a yellow box containing a password requirement: "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 (@\$!%*?&)". Below the requirement are two input fields: "Password" and "Confirm Password", each with an "eye" icon to the right. A large green "Submit" button is centered below the input fields. At the bottom, there is a "Cancel" link.

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 image shows a mobile-style 'Sign In' page. At the top, a blue header bar contains the text 'Sign In'. Below the header is a green rectangular box with the message 'Password has been updated'. Underneath this message are two input fields: the first is for the 'Username' (containing 'trainaw') and the second is for the 'Password'. Below these fields are two large buttons: a green 'Sign In' button and a blue 'Create Account' button. At the bottom of the page, 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.

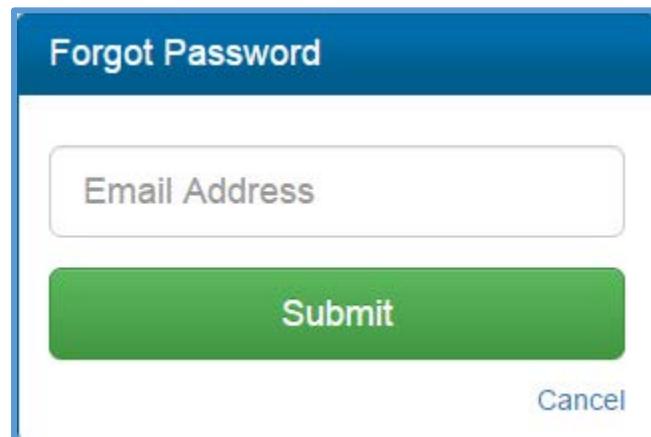
IRS Practice Lab displays the **Forgot Password** page with your security question:



The image shows a mobile-style "Forgot Password" page. The title "Forgot Password" is at the top in a blue header. Below it is a question in red: "In what city were you born?". There is a white input field labeled "Answer". Below the input field is a large green "Submit" button. At the bottom, there are two links: "Forgot Answer" on the left and "Cancel" on the right.

2. Click **Forgot Answer**.

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

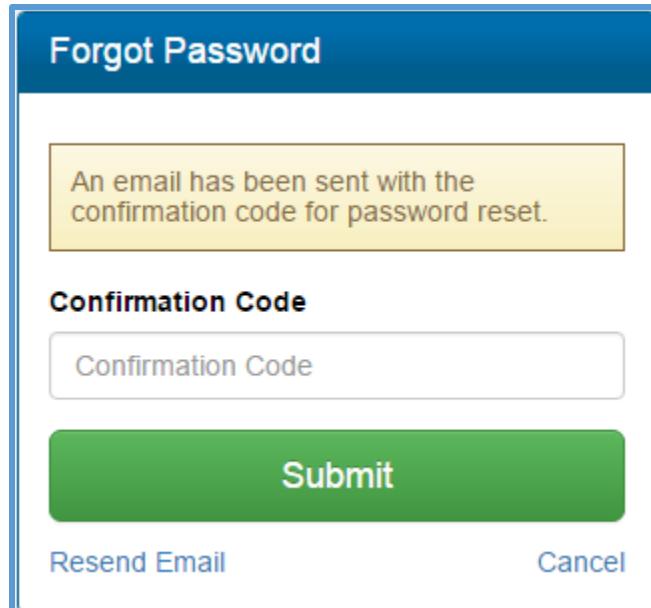


The image shows a mobile-style "Forgot Password" page. The title "Forgot Password" is at the top in a blue header. Below it is an input field labeled "Email Address". Below the input field is a large green "Submit" button. At the bottom, there is a link "Cancel" on the right.

3. Type your email address.

4. Click **Submit**.

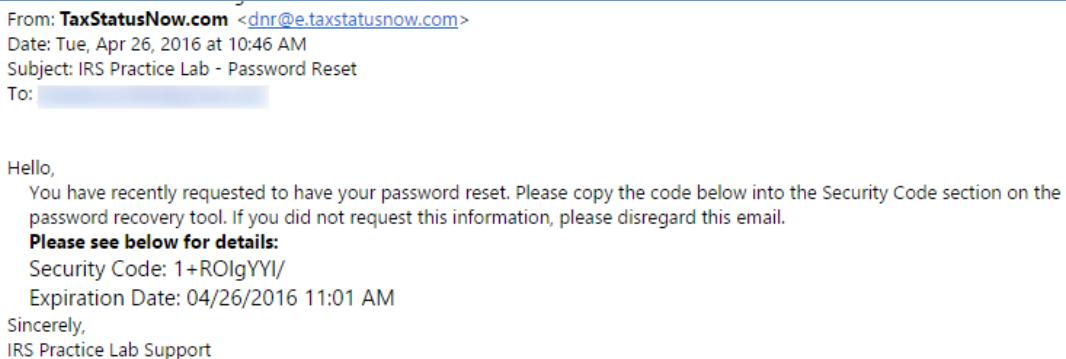
IRS Practice Lab displays the **Forgot Password** page for your confirmation code:



The image shows a 'Forgot Password' page with a blue header. A yellow box contains the message: 'An email has been sent with the confirmation code for password reset.' Below this is a 'Confirmation Code' section with a text input field and a green 'Submit' button. At the bottom are 'Resend Email' and 'Cancel' buttons.

5. Find the email from TaxStatusNow.com.

Your email service displays the email:



The email content is as follows:

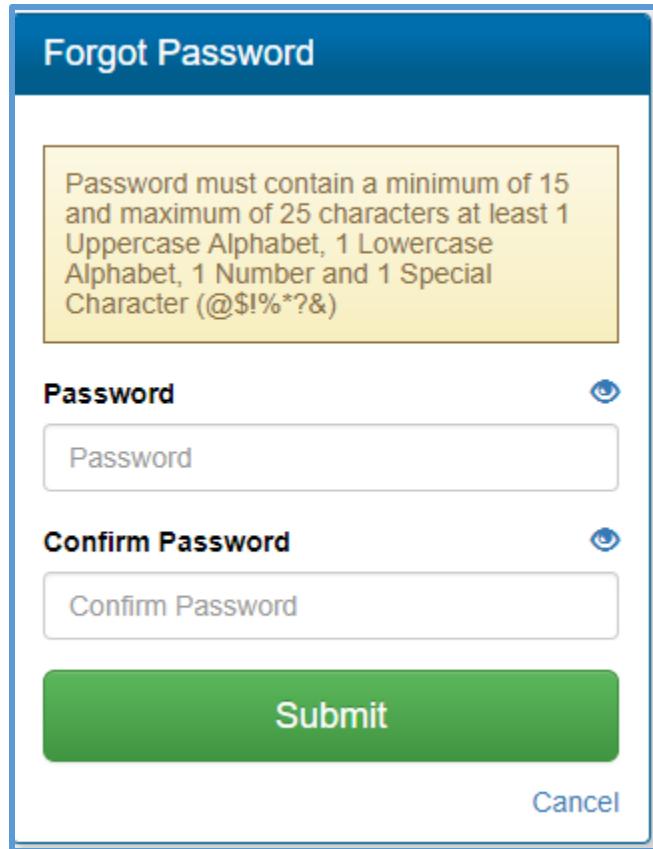
From: TaxStatusNow.com <dnr@e.taxstatusnow.com>
Date: Tue, Apr 26, 2016 at 10:46 AM
Subject: IRS Practice Lab - Password Reset
To: [REDACTED]

Hello,
You have recently requested to have your password reset. Please copy the code below into the Security Code section on the password recovery tool. If you did not request this information, please disregard this email.
Please see below for details:
Security Code: 1+ROlgYYI/
Expiration Date: 04/26/2016 11:01 AM
Sincerely,
IRS Practice Lab Support

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

7. Click **Submit**.

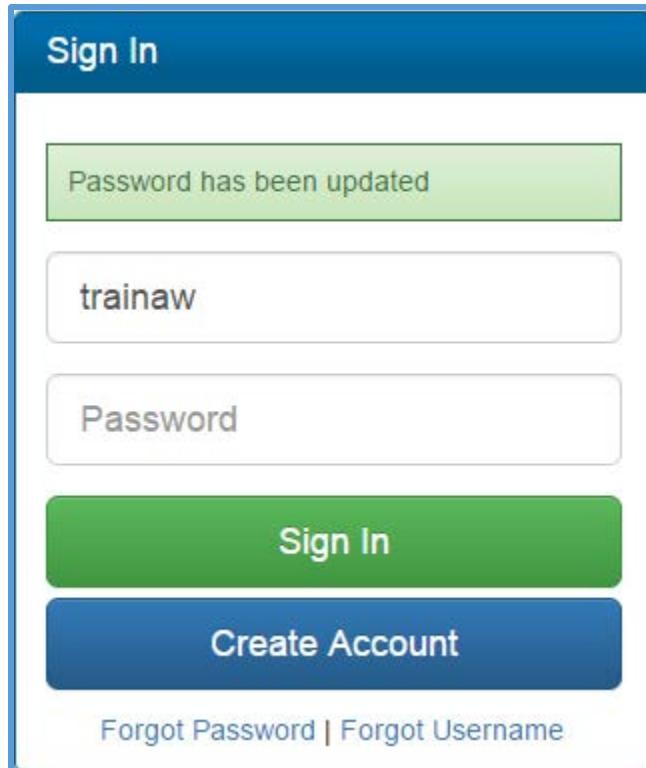
IRS Practice Lab displays the **Forgot Password** page to create a new password:



The screenshot shows the 'Forgot Password' page. At the top, a blue header bar contains the text 'Forgot Password'. Below the header, a yellow box displays a password requirement: '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 (@\$!%*?&)'. The main form area contains two input fields: 'Password' and 'Confirm Password', each with an 'eye' icon to toggle visibility. A large green 'Submit' button is positioned below the inputs, and a 'Cancel' link is located at the bottom right of the form area.

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

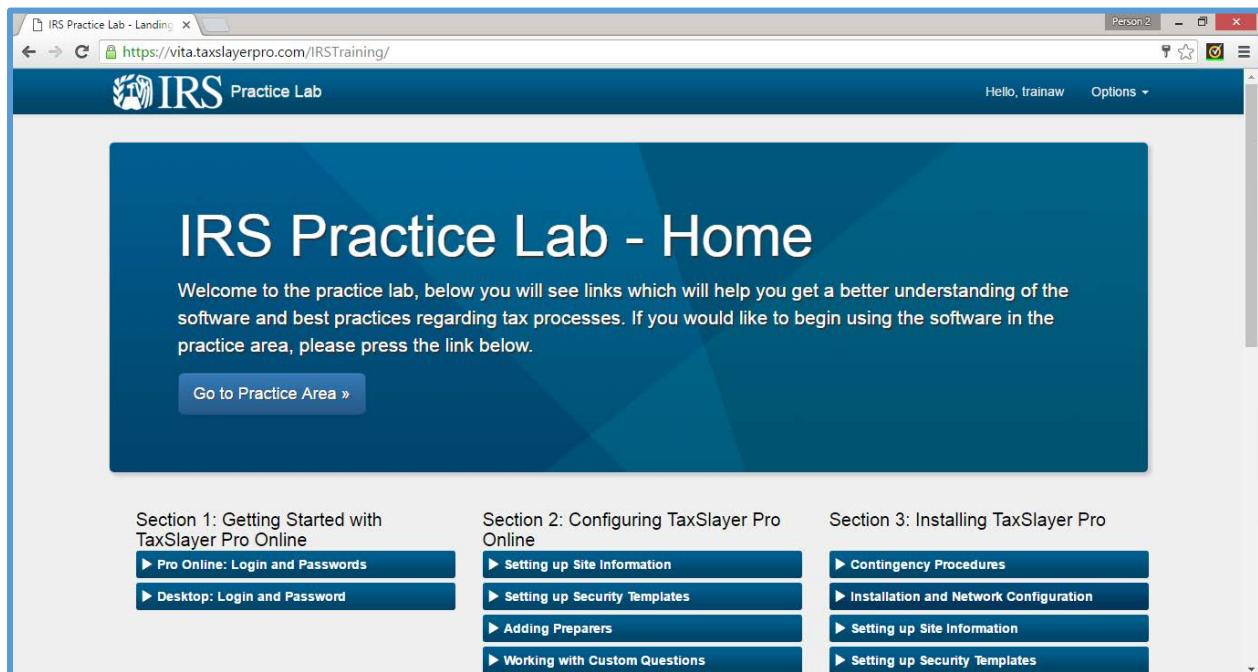
IRS Practice Lab displays the **Sign In** page with a message that your password has been updated:



The image shows the IRS Practice Lab Sign In page. At the top, a green box displays the message "Password has been updated". Below this, there is a text input field containing the username "trainaw". Below the username field is a password input field labeled "Password". Below the password field is a green "Sign In" button. Below the "Sign In" button is a blue "Create Account" button. At the bottom of the page are two links: "Forgot Password" and "Forgot Username".

Using the Practice Lab

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



The image shows the IRS Practice Lab - Home page. The page has a dark blue header with the IRS logo and the text "Practice Lab". The main content area has a dark blue background with the title "IRS Practice Lab - Home". Below the title, there is a welcome message: "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." Below the welcome message is a blue button with the text "Go to Practice Area »". At the bottom of the page, there are three sections with links:

Section 1: Getting Started with TaxSlayer Pro Online	Section 2: Configuring TaxSlayer Pro Online	Section 3: Installing TaxSlayer Pro
▶ Pro Online: Login and Passwords	▶ Setting up Site Information	▶ Contingency Procedures
▶ Desktop: Login and Password	▶ Setting up Security Templates	▶ Installation and Network Configuration
	▶ Adding Preparers	▶ Setting up Site Information
	▶ Working with Custom Questions	▶ 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:

Welcome to The Practice Lab

Message Center 77 Rejected Clients 0

Start New 2017 Tax Return
Create a brand new tax return for a client. Select

Client Search
Edit returns you previously started. Select

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:

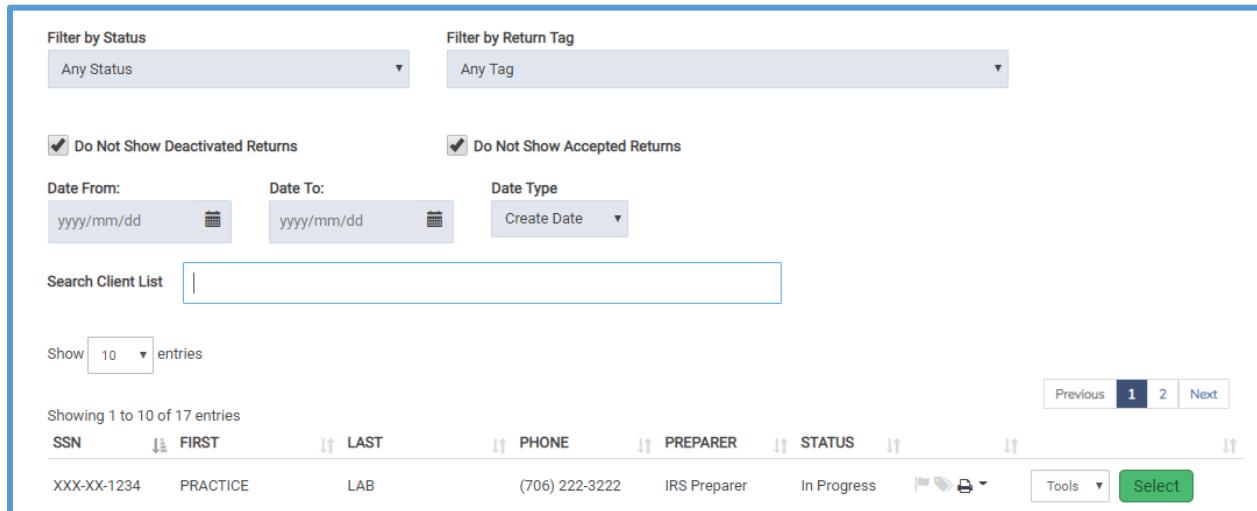
- You can mark a return for review. However, reviewers cannot review returns. When you mark the return for review and save the return, the return is complete for purposes of the IRS Practice Lab.
- You cannot electronically file a return.
- If your site will use Consent to Use and Consent to Disclose 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: [Search Input]

Show 10 entries

Showing 1 to 10 of 17 entries

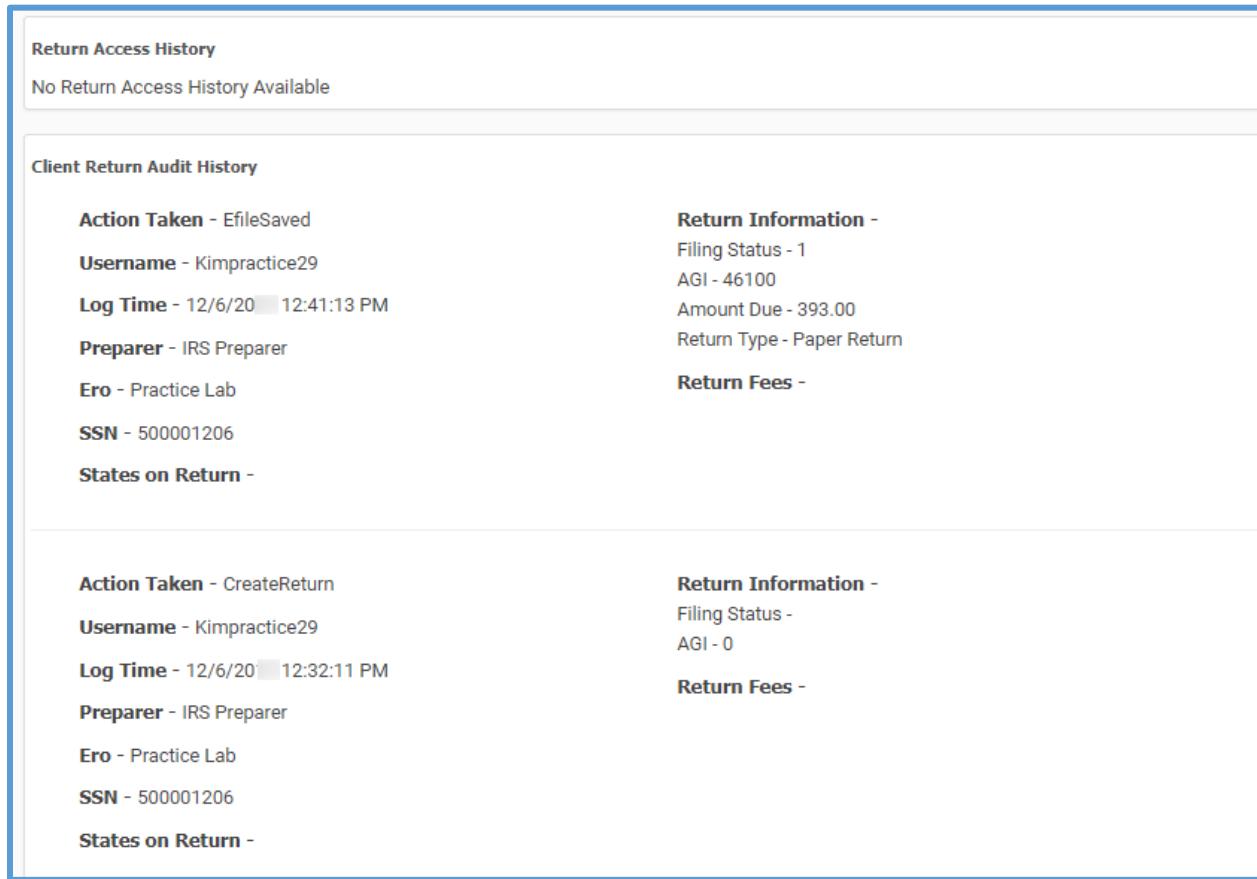
SSN	FIRST	LAST	PHONE	PREPARER	STATUS
XXX-XX-1234	PRACTICE	LAB	(706) 222-3222	IRS Preparer	In Progress

Previous 1 2 Next

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.

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