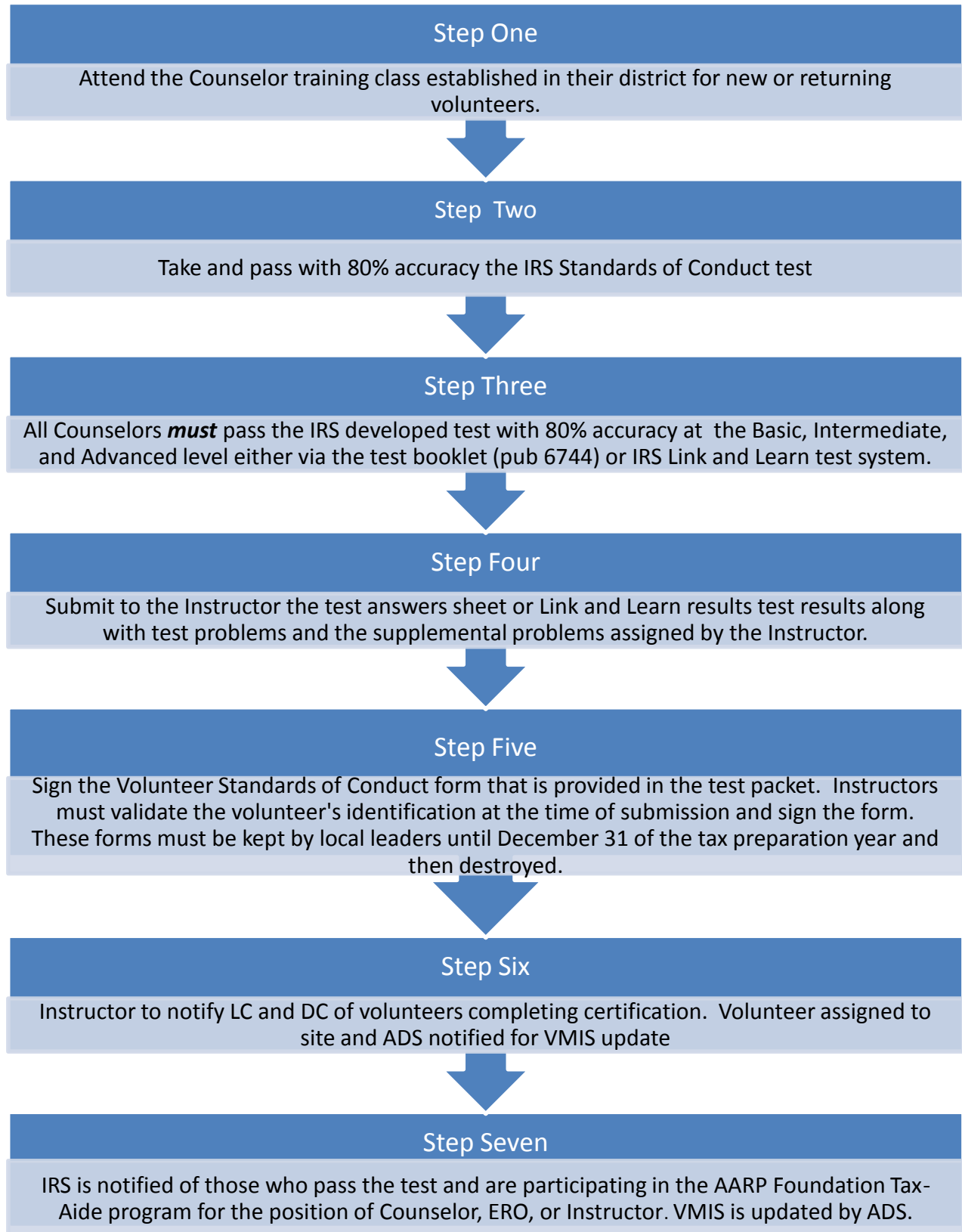


## Volunteer Training and Certification Process For Counselors

This process is to be utilized for all volunteers in the program who are certified each tax season to provide tax preparation assistance.



## Volunteer Training Process For Volunteers Not Providing Tax Assistance

This process is to be utilized for all volunteers in the program who are **NOT** certified each tax season to provide tax preparation assistance.

### Step One

Attend AARP Foundation Tax-Aide Policy & Procedure and IRS Standards of Conduct training sessions



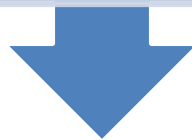
### Step Two

Take and pass with 80% accuracy the IRS Standards of Conduct test and sign the Volunteer Standards of Conduct form that is provided in the test packet. These forms must be kept by local leaders until December 31 and then destroyed.



### Step Three

Instructor to notify LC and DC of volunteers completing Policy and Procedures training and passing the Standards of Conduct Test. Volunteer assignment made and ADS notified for VMIS update



### Step Four

AARP Foundation Tax-Aide National Office and the IRS are notified of those who pass the Standards of Conduct test and are participating as a volunteer in the AARP Foundation Tax-Aide program.