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 Practice Lab.
2. Create a Practice Lab login.
3. Retrieve a lost user name.
4. Reset a password.
5. Start a return in Practice Lab.

TaxSlayer provides an environment in which you can prepare training returns. You can practice in TaxSlayer Pro Online to be fully prepared for tax season. Take the tax law certification courses in Link & Learn Taxes and then practice preparing returns.

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

1. Navigate to the Practice Lab in your browser:

Your browser displays the Practice Lab page:
If you are not currently a VITA/TCE volunteer and would like to become a volunteer, please navigate to 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.

2. Using the generic password that your SPEC Relationship Manager or Site Coordinator provides, type the password.
3. Click Login.

Practice Lab displays the Sign In page:

4. Click Create Account.
Practice Lab displays the **Create New Account** page:

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

**TIP**: Practice Lab displays a warning if you have previously used an 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 later in this lesson.

6. Type the email address again for verification.

7. Create a user name. We recommend that you use either *Train* or *Practice* in the user name.

**TIP**: All user names in TaxSlayer Pro Online must be unique in all online platforms. 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 you next filing season.

8. Type a password. Use an alphanumeric password containing at least six (6) characters.

9. Type the password again for verification.
10. 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

11. Type your Site Identification Number (SIDN) if you know it.

12. Select a security question from the list.

13. Type the answer to your security question.

14. Click **Create Account**.

Practice Lab displays the **Sign In** page with your new user name entered:
Signing In
To sign in to Practice Lab, use the following steps from the Sign In page.

1. Type the user name and alphanumeric password you created during account setup.
2. Click Sign In.

Practice Lab displays the Practice Lab – Home page:

![Practice Lab - Home](image)

Retrieving a User Name
If you forget your user name, use the following steps to retrieve it:

1. In your browser, navigate to [https://vita.taxslayerpro.com/IRSTraining](https://vita.taxslayerpro.com/IRSTraining).
Your browser displays the Practice Lab page:

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

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

3. Click **Forgot Username**.
Practice Lab displays the **Forgot Username** page:

![Forgot Username](image)

4. Type the email address you used to set up the Practice Lab account.
5. Click **Submit**.

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

![Sign In](image)

6. Find the email from TaxStatusNow.com.
Your email service displays the email:

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

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,
Practice Lab Support
```

7. Use the user name in the email to sign in to Practice Lab.

**Resetting Your Password**

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

1. Click **Forgot Password**.

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

```
Forgot Password

Username

Submit

Cancel
```

2. Type your user name.
3. Click **Submit**.
Practice Lab displays the **Forgot Password** page with your security question:

![Forgot Password Page](image1)

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

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

![Forgot Password Page](image2)

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

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

![Sign In page](image)

**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 to reach the **Forgot Password** page with your security question.
Practice Lab displays the **Forgot Password** page with your security question:

![Forgot Password](image)

2. Click **Forgot Answer**.

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

![Forgot Password](image)

3. Type your email address.
4. Click **Submit**.
Practice Lab displays the **Forgot Password** page for your confirmation code:

![Forgot Password page](image)

5. Find the email from TaxStatusNow.com.

Your email service displays the email:

```
From: TaxStatusNow.com <dng@teststatusnow.com>
Date: Tue, Apr 26, 2016 at 10:46 AM
Subject: Practice Lab - Password Reset

To: [email address]

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+R01gYy/
- Expiration Date: 04/26/2016 11:01 AM

Sincerely,
Practice Lab Support
```

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

7. Click **Submit**.
Using the Practice Lab

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

- Type a new password.
- Confirm the password.
- Click **Submit**.

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

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

Preparing Practice Returns

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

1. Click **Go to Practice Area** from the **Practice Lab – Home** page.
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.

**NOTE**: Do not prepare live returns on the Practice Lab. You should only use this site to practice returns.

2. Click **Select** on the Start New Tax Return line.
Practice Lab displays the **Enter Social Security Number** page:

3. Just as described in the *Starting a Tax Return* lesson, type the Social Security number twice for verification.

**TIP**: For the purposes of the Practice Lab, we recommend that you use *00* for the fourth and fifth numbers in the Social Security number. 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*.

4. Click **Available Taxpayer Profiles**.
Practice Lab displays the **Available Taxpayer Profiles** section:

5. Select a taxpayer profile.
6. Click **Start Return**.
Practice Lab displays the **What’s your filing status?** page:

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

You can prepare and print a return, 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 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 Practice Lab.

**Using the Office Client List**

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

1. Click **Select** on the **Client Search** line.
Practice Lab displays the **Office Client List** page:

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

![Client Status Page](image)

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