TRAINING AND REFERENCE MATERIALS

TaxSlayer Information

- TaxSlayer Practice Lab – Site where volunteers can learn about software used for tax preparation

IRS Materials

- Pub 4491 – Student Training Guide – More in-depth discussion of tax topics
- Pub 4961 – Volunteer Standards of Conduct – Guide for Site Ethics
- Pub 5101 – Intake/Interview and Quality Review Training – Guide for complete client interview before tax input
- Pub 4942 – Health Savings Accounts (HSA) – Guide to complete additional certification for Health Savings Accounts

NYS Training Materials

- NYS Volunteer Training and Education Materials