

Learning Solutions

Key Features

- Comprehensive online training in tax law and interview skills
- Interactive training with case studies, scenarios, sample interviews with audio, quizzes
- Instructional support for blended learning environment including lesson plans and presentations
- Companion 400-page print training guide
- Online assessment and certification for eight levels of expertise
- Annual evaluation and response to user surveys



IRS Link & Learn Taxes: Training and Certification for Volunteer Tax Preparers

Convenient, Cost-effective Training Needed

Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) are IRS programs that provide free tax assistance to more than three million low-income and senior taxpayers. The IRS trained its VITA/TCE volunteers in three- to five-day classroom sessions. This presented challenges for volunteers because of the time commitment, lack of class availability, and travel required for the training. Printed course materials had to be updated each year to reflect new tax laws, a time-consuming and costly burden on the IRS. The IRS decided to explore the benefits of web-based training for its volunteers.

From Paper to Pixels

Epsilon's Learning Solutions team developed Link & Learn Taxes for the IRS, an 80-hour web-based training program comprising over 4,000 pages of tax law narrative, examples, case studies, interview simulations, audio, and comprehensive exercises. Instructional support in the form of lesson plans, presentations, and a printed training guide are available for blended learning environments.

Link & Learn Taxes trains via five volunteer certification paths: Standards of Conduct, Basic, Advanced, Military and International. Additional training covers Puerto Rico, Foreign Student, Cancellation of Debt, and Health Savings Accounts. Experienced volunteers can catch up on new tax laws with a Returning Student course. Certification courses are also available in Spanish and all courseware is Section 508 compliant.

Epsilon Learning Solutions

Applying Knowledge, Practicing Skills, Accessing Resources

The ability to accurately complete tax returns is essential for VITA/TCE volunteers. Link & Learn Taxes supports this mission with:

- Comprehensive training in tax law and taxpayer interview skills
- Realistic case studies and taxpayer interviews with audio
- Topic Activities that help volunteers apply what they've learned
- Check Your Knowledge quizzes on each topic
- A Training Toolkit for easy access to a range of resources including lessons, job aids, audio and video media, tutorials, assessments, and a practice lab
- Practice tests designed to measure mastery of course objectives
- Links to tax forms and publications

Blended Learning and Instructor-led Training Support

Impressed with the instructional excellence of Link & Learn Taxes, the IRS asked the Learning Solutions team to develop printed student and instructor guides and additional instructor support for classroom training environments. The VITA/TCE training materials include:

- 35 microsite web pages specifically designed for instructors
- 35 interactive lesson plans and presentations with speaker notes
- Links to informative YouTube videos, podcasts, and tax software training.
- Tips, cautions, examples, and sample interviews to reinforce the narrative
- Exercises that help volunteers confirm their understanding of the content
- An index for quick reference to vital information

Ongoing Success

Link & Learn Taxes has been on the IRS website (<http://www.irs.gov>) and CD-ROM since 2004, and is available to volunteers and the general public. During peak periods, more than 300,000 people visit Link & Learn Taxes; over 20 million pages have been viewed. There have been over 900,000 certifications using the online test and more volunteers are certified every year. Epsilon continually reviews user evaluations and client feedback for ways to improve the learning experience at Link & Learn Taxes.

The image displays three screenshots of the Link & Learn Taxes website interface. The top screenshot shows the main navigation menu with options for Home, Certification Paths, Puerto Rico, and Foreign Student. Below this is a 'WELCOME to the Advanced Course' banner and a 'Course Menu' section. The middle screenshot shows a 'Lesson Plan' for 'Income from Form 1040 Lines 7-11', detailing objectives, topics, and key terms. The bottom screenshot shows a 'Skills Warm Up: Qualifying Widow(er)' quiz question with multiple-choice options and a feedback message indicating an incorrect answer.

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