



Tax-Aid Volunteer Training Descriptions

| | Training | Description |
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| A | Basic Volunteer Training | A 2 hour course that covers an introduction to Tax-Aid and Lacerte. Volunteers who are not eligible for the Experienced Training (below) must attend Basic Volunteer Training. |
| B | Experienced/Returning Volunteer Training | A 1 hour course for volunteers who have 5 or more years of Tax-Aid volunteer experience. The class covers new tax law and new software updates for the upcoming tax season. |
| C | Lacerte (software) Lab Training | A 1 hour course designed for those volunteers who would like to practice their Lacerte skills. This practical lab setting allows students to familiarize themselves with the software prior to volunteering at a site. Volunteers should have attended the Basic or Experienced class prior to attending. |
| D | Lacerte Online – Program Functionality Training (CPE credit) | A 3 hour free online class for volunteers who would like to learn more about Lacerte. This self paced class offers students a CPE credit option at the end of the training. Volunteers would fax a copy of the CPE certificate to Tax-Aid. |

Recommendation for **new Tax-Aid** volunteers:

Option 1 – Attend New Volunteer Training (Training A), Lacerte Lab (Training C) and Lacerte Online (Training D)

Recommendation for **experienced/returning** volunteers:

Option 1 – Attend the Experienced/Returning VITA Volunteer Training (Training B)

Option 2 – Attend the Experienced/Returning VITA Volunteer Training (Training B) and Lacerte Lab Training (Training C)

Optional addition for Experienced/returning volunteers – Lacerte online (Training D)