

**Practice Lab on  
Link & Learn Taxes  
Frequently Asked Questions  
11-12-09**

1. **Question:** How does the user access the Practice Lab?

**Answer:** Once the user is in Link & Learn Taxes and clicks on the Practice Lab link, the next step is to use the universal password [REDACTED] to access the Practice Lab. After logging into the Practice Lab with the universal password first time users will need to create a unique **User ID**. Users will need a zip code and optionally an email address to create this UserID. The system will instantly create and display the **unique User ID**. If an email address is provided the system will also send the User ID to the email address.

If you have recently obtained a new UserID for the Practice Lab to view the webinars you do not need to obtain a new UserID.

The unique UserID **cannot** be retrieved if it is lost or misplaced. A new User ID must be created. Any practice returns created under the original User ID will be lost.

2. **Question:** I know you have to register for a password on Link & Learn Taxes to take the online test. I have just learned you need a password for the new Practice Lab on Link & Learn Taxes. Are these different or can I use the same password?

**Answer:** The password for each system is different. However the process to access each is quick and easy.

**For the online test on Link & Learn Taxes**

Users complete a self registration to create their own **login and password**. Users should safeguard their login and password for future use. It is possible for the password to be reset if it is lost or forgotten.

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For the Practice Lab, VITA/TCE volunteers will have a **universal password** which will be provided by their site coordinator or instructor. The **universal password** is used to access the system.

The next step is to create an individual **User ID**. Just enter a ZIP code and (optionally) an email address and the system immediately generates a unique **User ID**. This is a six digit number that must be safeguarded. Users will need both the **universal password** and their **User ID** to return to the Practice Lab to complete practice returns or start new returns. This User ID **cannot** be retrieved if forgotten or lost. A new User ID will have to be created.

**(Note: If you start a return and lose your User ID that data is lost. The user would have to create a new User ID and start the return again.)**

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3. **Question:** Will the system save their work? For example a return is started but not completed, will the volunteer be able to go back a day or so later and complete the practice return?

**Answer:** Yes, the Practice Lab will save the return but this is not automatic. Users must frequently use the **save button** at the top of the screen to save their work. The returns you create from practice or test scenarios are associated with your UserID so when you log back into the Practice Lab you can access them again.

4. **Question:** How do you input the sales/excise taxes on a new vehicle on the return?

**Answer:** The new car sales/excise tax can be used as an extra standard deduction or an itemized deduction. From Schedule L line 10, link to the Schedule A. From line 7 Schedule A, link to the new worksheet for new car sales tax. Enter on line 1 of the worksheet the amount of the sales/excise taxes and on line 2 enter the purchase price of the vehicle. The information is carried to the Schedule L.

5. **Question:** How do you input real estate taxes?

**Answer:** This is an extra standard deduction or an itemized deduction. You start from Schedule L and then link to Schedule A. On Schedule A you enter the amount of the real estate taxes. The amount is carried to the Schedule L.

6. **Question:** Can you print a tax return that is prepared in the Practice Lab?

**Answer:** The print function is not enabled at this time. Users can minimize the Practice Lab screen in order to view the tax return and the test at the same time. You can also utilize Alt+tab to toggle between the Practice Lab and Link & Learn Taxes but be aware of timing out. See Q&A 8 below.

7. **Question:** Will we be able to have both the Link & Learn Taxes Test and the TaxWise Practice Lab open at the same time to go back & forth between screens?

**Answer:** Users can have both screens open but the online test will time-out if there is a period of inactivity. It is recommended that volunteers use the scenario information in Form 6744 to complete the returns in the Practice Lab first, then log into the test on Link & Learn Taxes and answer the test questions.

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8. **Question:** What about the course in Link & Learn? Can a volunteer working in the Practice Lab be able to go back to Link and Learn Taxes course without going out of the Practice Lab environment?

**Answer:** Yes. The Practice Lab icon (link) will be on the menu page for each course level in Link & Learn Taxes. When you click the Practice Lab link, a window appears advising you are leaving the IRS site. At that point you will log on to the Practice Lab. The Link & Learn Taxes menu is still open in another window. If you log off the Practice Lab the Link & Learn Taxes menu for the course will remain on your screen. If you do not log off the Practice Lab you can toggle back and forth from the Practice Lab and Link & Learn Taxes by clicking the windows on the taskbar at the bottom of the screen. You can also toggle back and forth by using Alt+tab.

9. **Question:** Can a practice social security number be used more than once? For example if I use 123-45-6789 and another user inputs that same number, will there be a problem?

**Answer:** This situation will be avoided for the practice and test scenarios if the volunteer uses the User ID to complete the SSNs and EINs. The first three numbers of the SSN and EINs are provided in the scenarios in the Publication 4491-W Workbook and Form 6744, Test/Retest. Volunteers should replace the X's in the SSNs and the EINs with unique six digit User ID generated from the Practice Lab. In this way, practice returns created will be associated only with that specific user.

10. **Question:** What is the procedure for the students or instructors getting into the system? Do the instructors have to send a email listing the students, or does each student have to email or call?

**Answer:** All relationship managers will have the universal password and it will their responsibility to ensure the password is shared timely with their partners. Partners will then share the password with volunteers in the VITA/TCE program.

11. **Question:** If a new volunteer contacts the relationship manager for the password how should that be handled?

**Answer:** New volunteers should be referred to a partner so the partner can first set the person up as a volunteer.

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12. **Question:** Will the integration of Link & Learn also include TaxWise desktop or only TaxWise Online?

**Answer:** The Practice Lab is a tool developed by TaxWise that is a modified version of TaxWise Online.

13. **Question:** Can you book mark a section or problem scenario to come back at a later time to finish?

**Answer:** The practice scenarios are those in the printed Publication 4491-W Workbook. The tax returns created for these scenarios can be completed in more than one sitting. However, students must **SAVE** their work. Tax returns are associated with a unique UserID. When a student logs back into the Practice Lab with their UserID they will see a link "Show All returns." A list of tax returns created will be displayed. Students can click the link to finish the tax return.

14. **Question:** Will the Practice Lab be available year-round, or only during certain months? If it is only available during certain months, which months are they?

**Answer:** The Practice Lab will be available year around until it is updated for the next tax year.

15. **Question:** Why bother to have a password if it will be universal? If it will be distributed to everyone who attends a volunteer class, the password will be so widely available that it will no longer be secure.

**Answer:** The Practice Lab was developed as a **training tool** specifically for VITA/TCE volunteers. While having a password is a requirement for its use it is universal to avoid barriers in accessing the system for training. There is no personal data in the Practice Lab and no tax returns can be electronically filed from the system.

16. **Question:** Once you prepare a return in the Practice Lab will there be any mechanism other than "diagnostics" to indicate if the return was completed correctly?

**Answer:** The diagnostics functionality is **not available** in the Practice Lab since it is designed for e-file. One tool students can use is the interview to help with tax law determinations in order to prepare an accurate return.

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17. **Question:** In addition to the Pub 4491-W problems and exercises and test problem scenarios, can volunteers/instructors create other tax returns from their own sample problems and scenarios using the Practice Lab?

**Answer:** Yes, some partners give students homework. Students will be able to use the Practice Lab at home to complete the tax returns for these practice scenarios.

18. **Question:** What does the “break in time” between the training but before the sites open refer to?

**Answer:** Some partners have training in November or December. Volunteers may not report to their sites until mid January or February. Having the Practice Lab on Link & Learn Taxes enables students to review and practice the skills they will need at the volunteer sites to prepare accurate returns.

19. **Question:** What are the recommended/accepted methods for distributing the universal password that allows access to the Practice Lab?

**Answer:** All relationship managers will have the universal password and it will be up to the relationship manager the best method for the delivery of the Practice Lab password to their partners.

20. **Question:** Are there any restrictions on who may use the Practice Lab?

**Answer:** The Practice Lab was developed as a **training tool** specifically for VITA/TCE volunteers. It is restricted to authorized IRS licensees only and requires a password.

21. **Question:** Are there any demos available to show how TaxWise Online functions (differs from desktop) before volunteers begin using the Practice Lab?

**Answer:** There will be a tutorial on the home page of the Practice Lab that provides guidance for new users. In addition refer to the blue tab pages in Pub 4012 as a resource.