

# LADDER UP

## Volunteering with Ladder Up for 2018-2019

### A Message to Our Returning Volunteers

Our sign-up process has changed a number of times in recent years, and we apologize for any confusion or frustration that these changes may have caused. We greatly appreciate your patience as we migrate our scheduling platform back to VolunteerHub for the 2019 tax season. We also welcome your suggestions and feedback as we continue to seek ways to improve the experience for our volunteers. Please know that we, as well as our clients, are extremely grateful for your continued support and involvement.

### Steps for Getting Started

Thank you for your interest in volunteering to help hardworking clients prepare their tax returns and secure critical tax refunds.

All Ladder Up volunteers will use two online platforms:

1. **VolunteerHub ([GoLadderUp.VolunteerHub.com](http://GoLadderUp.VolunteerHub.com)):**  
You will use VolunteerHub to manage your schedule (i.e. sign up for training and volunteer sessions at tax sites)
2. **Thinkific ([GoLadderUp.Thinkific.com](http://GoLadderUp.Thinkific.com))**  
You will use Thinkific to access course materials (i.e. tax topic modules, training guides, etc.) and the tax certification tests.

To get started as a Ladder Up volunteer tax preparer, please follow these steps:

1. **Sign in to VolunteerHub** to schedule your training and sign up for volunteer sessions
  - **New volunteers:** [Create a VolunteerHub account](#)
  - **Returning volunteers:** [Reactivate your existing account](#)
    - If you do not know your username or password, click "[Forgot Password](#)" to send a password-reset link to your email address. Your username will appear in the resulting Password Reset Request email from VolunteerHubMessaging.
    - If VolunteerHub tells you that you have multiple accounts, please contact [volunteers@goladderup.org](mailto:volunteers@goladderup.org)
    - If all else fails, [create a new account](#)

### Sign In

Username

Password

Keep me logged in [Forgot password?](#)

**SIGN IN**

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Don't have an account? [Create New Account](#)

### LADDER UP

## Password Reset Request

A password reset has been requested for this account. If you requested a password reset, please click the link below to continue. If you did not request this, simply ignore this email or contact Ladder Up for more information.

**Organization**  
Ladder Up

**Username**  
[volunteers@goladderup.org](mailto:volunteers@goladderup.org)

2. **Create a Thinkific account** to access online learning resources and certification tests
  - **New and Returning volunteers:** Create a [Thinkific](#) account (even if you had an account last year).
    - Note: We recommend that you use the SAME USERNAME AND PASSWORD for [Thinkific](#) and [VolunteerHub](#) to minimize confusion.
3. **Per IRS rules, every Ladder Up volunteer must do the following items every year before attending any volunteer sessions:**
  - Complete the IRS Volunteer Standards of Conduct training and certification test
  - Complete the IRS Intake, Interview, and Quality Review (IIQR) certification test
  - Sign the IRS Volunteer Standards of Conduct Agreement
4. **Once you have created accounts with VolunteerHub and Thinkific, you may sign up for training sessions through VolunteerHub:**
  - **New volunteers:** There are two in-person training options, **Basic *or* Advanced**. Though similar, the Advanced training goes into a deeper level of tax law. We suggest that new volunteers with no tax experience begin with the Basic training. However, some of our clients have returns that can only be completed by Advanced preparers, and thus we often need more volunteers with Advanced certification. If you are willing to challenge yourself, please consider signing up for the Advanced training.
  - **Returning volunteers:** Please sign up for an in-person Basic or Advanced training.
    - Additionally, **EXPERIENCED** returning volunteers may choose a self-guided training option, which entails signing up for an available time slot using [VolunteerHub](#) to come into the Ladder Up office to complete the certification test on your own, without a trainer or tax law instruction.
5. After you have registered for a training session, you will receive a **confirmation email** with instructions directing you to [Thinkific](#) to complete your pre-work training modules online prior to attending training.
6. **Complete the pre-work and review the online modules before you attend training.** Trust us, you will want to be ready!
  - Once logged into [Thinkific](#), refer back to the **confirmation email** you received from [VolunteerHub](#) after you signed up for a training session and complete the following components:
    1. Required prerequisites that must be completed by ALL volunteers (described in step 3 above)
    2. Additional pre-work modules and specific assignments based on the training you selected (i.e. filing status and dependents, important tax credits, what's new, etc.)
    3. The first portion of the tax certification exam – if possible, please complete this portion before attending training so you can spend more time practicing with the ProSeries tax software during your in-person training session
  - **Note: Please make sure your courses within Thinkific show 100% complete** after you have finished them. If they do not, be sure you have clicked the "Next" button on each page.
7. **Attend in-person training.**
  - If attending a Basic training, complete certification questions #1-10 and bring the answers with you.
  - If attending an Advanced training, complete certification questions #1-9 and bring the answers with you.
  - If you need extra time to complete the certification test after your training session, you may sign up for an additional self-guided training session.
8. **Enter your test answers online** in [Thinkific](#) for either the [Basic](#) or [Advanced](#) test and submit. A passing score per IRS guidelines is 80%. If you do not pass the certification test, please contact us at [volunteers@goladderup.org](mailto:volunteers@goladderup.org).
9. **Sign up to volunteer for at least 3 volunteer sessions during the tax season using VolunteerHub!**
10. **Optional: Review supplemental training materials** available in [Thinkific](#) and on the Prosperity Now website: <http://prosperitynow.isebox.net/vita-training-platform>