

# LADDER UP

## Volunteering with Ladder Up for the 2020 Tax Season

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

### A Message to Our Returning Volunteers

Our sign-up and certification process have 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 online training and certification platform to **ExceedLMS** for the 2020 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

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. **ExceedLMS** ([GoLadderUp.ExceedLMS.com](http://GoLadderUp.ExceedLMS.com)) – You will use ExceedLMS to access all online training modules and enter your answers to the required IRS Certification Tests.

To get started, please follow these steps:

1. **Sign in to VolunteerHub** to make sure your account is active. If you'd like more information on using VolunteerHub (or anything else) please check out our [Volunteer Resources](#) page.

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### Sign In

Returning Volunteers: Welcome back! Please reactivate your existing account, or click "Forgot Password"

New Volunteers: Make sure you **first** create an account here in VolunteerHub.

After you have finished creating your VolunteerHub account, head to the [E-Learning and Certification Center: ExceedLMS](#) and make another account using the SAME username and password.

ExceedLMS houses all online training modules and certification tests, and VolunteerHub is where you will sign up for training and tax sessions. Additional resources are available on our [website](#).

Username

Password

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

**SIGN IN**

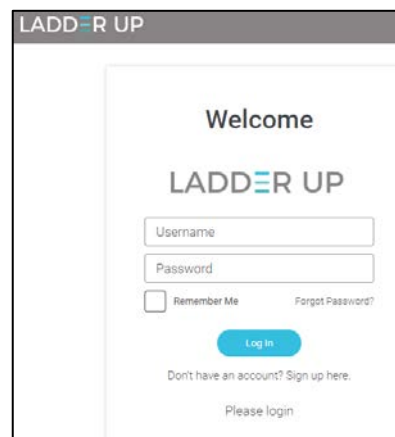
Don't have an account? [Create New Account](#)

- **New volunteers:** [Create a VolunteerHub account](#)
  - Use your email as your username to make it easier to log in
- **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 VolunteerHub Messaging.
  - If VolunteerHub tells you that you have multiple accounts, please contact [volunteer@goladderup.org](mailto:volunteer@goladderup.org)
  - If all else fails, [create a new account](#)

2. Create an [ExceedLMS](#) account to access the online training modules and all the required certification tests. If you'd like more information on using ExceedLMS (or anything else) please check out our [Volunteer Resources](#) page.

- **New and Returning volunteers:** Create an account or log into your account for [ExceedLMS](#)

**Tip:** We recommend that you use the **SAME USERNAME AND PASSWORD** for both ExceedLMS and VolunteerHub to minimize confusion and to make sure your test certifications sync properly with your volunteer profile in VolunteerHub.



3. Once you have established accounts with VolunteerHub and ExceedLMS, **sign up for an in-person ProSeries training and tax certification class through VolunteerHub.** If you'd like more information on using VolunteerHub (or anything else) please check out our [Volunteer Resources](#) page.

- In-person ProSeries training and certification session **locations can be viewed [here](#).**

**Note:** Volunteers planning to serve in the roles of **Intake Screener or Interpreter can skip to Step 4** in this document, as only Tax Preparers and Reviewers need to attend an in-person ProSeries Training & Certification class.

- **New volunteers:** You must [attend an in-person Training and Certification class with instructor](#) to volunteer as a Tax Preparer, Quality Reviewer, or Case Reviewer. Classes typically last 4 hours.
- **Returning volunteers:** Please sign up for either a regular in-person Training and Certification Class (with an instructor), or, if you are familiar with ProSeries tax software, you may sign up for a self-guided session. The Self-Guided option allows you to come into the Ladder Up office (or one of the other locations offering this option) to complete the [Tax Certification test](#) scenarios that require tax software on your own. The **Self-Guided option** also allows volunteers to spend additional time practicing how to use ProSeries **without an instructor present.**

4. **Complete all of the online training modules in ExceedLMS.**

- Volunteers serving in all roles must complete the [Required Volunteer Trainings \(Modules 1-5\) path](#)
- For volunteers planning to serve in the roles of Tax Preparer or Quality Reviewer, *online training must be completed **before*** you attend the in-person ProSeries Training and Certification session.

- Module 1: Volunteering with Ladder Up
- Module 2: Filing Status and Dependents
- Module 3: Common Tax Documents and Situations
- Module 4: Common Tax Credits and Deductions
- Module 5: Illinois State Taxes and Next Steps
- Additional Optional Module: Using ProSeries Tax Software
- Additional Optional Module: Health Savings Account (HSA) Certification Test
- Additional Required Module for Quality Reviewers: Quality Reviewer Training

- **Each training module includes a Knowledge Check.** If you miss any questions on a Knowledge Check, we recommend that you review the module content again, or use one of the additional resources linked in the training to learn more on the topic.
- For more information on navigating through course paths using ExceedLMS, please check out our [Volunteer Resources](#) page.

5. If you are training to become a Tax Preparer or Quality Reviewer (or are a new volunteer planning to become a Case Reviewer), please make sure to **answer all the questions on the [Tax Certification test](#) that do not require tax software before arriving at an in-person Training and Certification class and bring your [test answers](#) with you to the training.**
  - Questions that do not require tax software include: #1-12, 19-21, 26, 28-29, 33-35
  
6. **Attend your in-person ProSeries Training and Certification class.**
  - Again, please make sure to complete the **Required Volunteer Trainings (Modules 1-5)** in [ExceedLMS](#) **before** attending an in-person training. The instructor will assume you have the base of tax knowledge covered in the online training modules.
  - If you are a new volunteer, or have never used ProSeries, we also recommend that you review the additional optional online training: *Using ProSeries Tax Software*, hosted in [ExceedLMS](#).
  - If you need extra time to complete the [Tax Certification test](#) after your training session, you may sign up for a self-guided session to have additional time with ProSeries tax software in the Ladder Up office, or use the [IRS Link & Learn Taxes page](#) to complete the test using TaxSlayer tax software.
  
7. **Complete all the certification tests required for your volunteer role in [ExceedLMS](#).**
  - Click on the [Required Certification Tests path](#) to complete all the required trainings and tests:
    1. Volunteer Standards of Conduct training and certification test (10 questions) and the Volunteer Standards of Conduct Agreement – **required for all roles**
    2. Intake, Interview, and Quality Review (IIQR) certification training and test (10 questions) – **required for all roles**
    3. Tax Certification test (35 questions) – **required for Tax Preparers, Quality Reviewers, and new volunteers serving in the Case Reviewer role.**
      - The tax certification test is not required for Intake Screeners, Interpreters, or experienced (50 VITA hours served or more) Case Reviewers.
  - The IRS requires that every Ladder Up volunteer complete these items every year.
  - Per IRS guidelines, a score of 80% or more is a passing score. If you do not pass the certification test, please contact us at [volunteer@goladderup.org](mailto:volunteer@goladderup.org) or by calling 312-409-1555 ext. 6.

**Note:** You will see an error message pop up when you click the “launch” link to enter your test answers. **For each test, you will need to re-enter your e-mail address, and then click the blue Login button to proceed.**

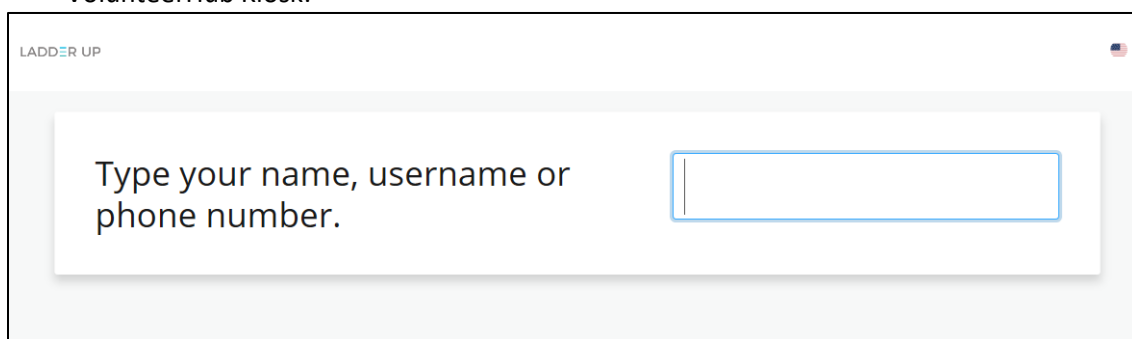
The screenshot shows the 'Assessment Login' interface. At the top, there are navigation tabs: LOGIN, CONFIRM LOGIN, ASSESSMENT, and SUMMARY. Below the tabs, a red error message states: 'Invalid or missing login information. Arrows indicate invalid data.' Below the error message, there is a text box with the instruction: 'Enter any information requested below to start taking this assessment. Click the Login button at the bottom to begin.' The form contains the following fields:

- Assessment ID: 2019-IRSTAXCERT
- First Name: Test
- Last Name: Taker
- Email Address: (This field is highlighted with a red box and contains a red error icon)
- Required Information: (This label is also highlighted with a red box)

At the bottom right of the form, there is a blue 'Login >' button, which is also highlighted with a red box.

8. **Sign up to volunteer at least twice a month using VolunteerHub!**
  - **For New Volunteers** – We recommend that you come out to a tax site for the first time *before March 15*. The complexity of client situations and returns tends to increase throughout the tax season.
  - **Volunteering after April 15** – We offer Summer Sessions for clients at various locations (although primarily in the Loop). If you're free to continue volunteering from May-September, please sign up to volunteer during a Summer Session.
9. **Optional: Review additional supplemental training materials** available on the [Ladder Up Volunteer Resource Page](#)
10. **Make it count every time you come out with Ladder Up!** If you'd like more information on using the VolunteerHub Kiosk and making sure your volunteer hours are up-to-date, please check out our [Volunteer Resources](#) page.
  - When you arrive at a training or tax session, please always use the VolunteerHub Kiosk link on the internet computer or tablet to sign in and out. Your time will not be recorded in your volunteer profile unless you sign in and sign out.
  - Tracking accurate total volunteer hours is important for many of Ladder Up's funders, and if you need to report community hours/education hours to your school or employer this will ensure that your record is accurate.

VolunteerHub Kiosk:



The image shows a screenshot of the VolunteerHub Kiosk sign-in interface. At the top left, the text "LADDER UP" is visible. In the top right corner, there is a small American flag icon. The main area of the screen features a white rectangular box with a light gray border. Inside this box, the text "Type your name, username or phone number." is displayed in a dark gray font. To the right of this text is a rectangular input field with a blue border, intended for the user to enter their identification information.

Thank you for volunteering with Ladder Up!