

# Taking the Tests Online

## Tax Year 2017

### Mandatory for Tax-Aide Counselors

- Volunteer Standards of Conduct Exam
- Intake/Interview and Quality Review Exam
- Advanced Exam

The *Volunteer Standards of Conduct Exam* is required for all volunteers. The *Intake/Interview and Quality Review Exam* is also required of Client Facilitators. That exam and the *Advanced Exam* are required for all volunteers who will be working with taxpayer data.

### Optional

A fourth test, *Health Savings Accounts (HSA) Exam* is optional, but as many as possible should certify. HSA is in scope with certification, but requires two HSA-certified counselors to do a return; one to prepare the return and a second for Quality Review.

Training for the *Volunteer Standards of Conduct Exam* is available in IRS Publication 4961, which is available only electronically. It can be downloaded via the Volunteer Standards of Conduct course link on the VITA/TCE Central page or from the IRS web site at [www.irs.gov](http://www.irs.gov).

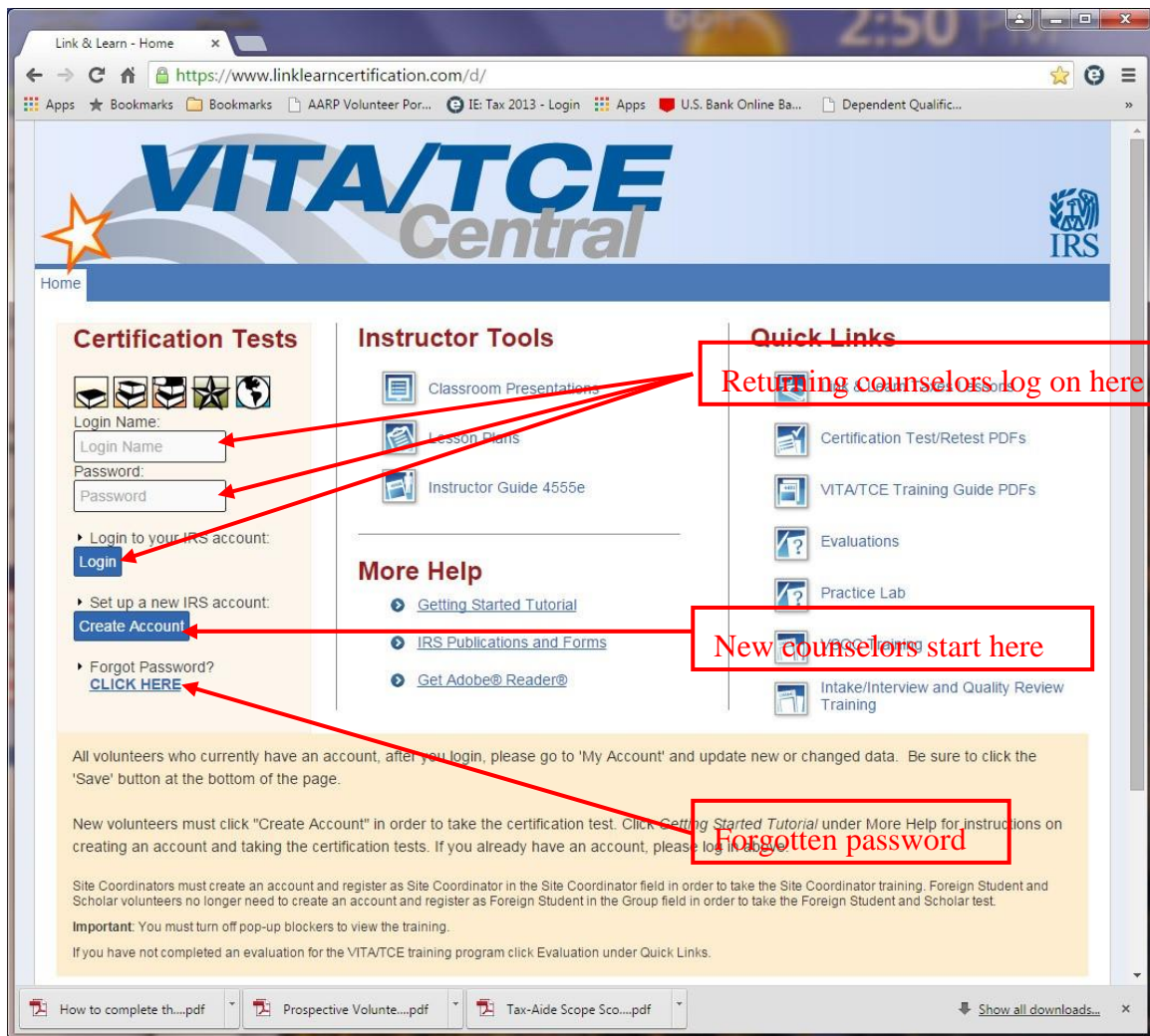
Training for the *Intake/Interview and Quality Review Exam* is in IRS Publication 5101. This publication can be downloaded from the sites as mentioned above. Even if you think you can pass the exam without studying, this is very useful information that should not be ignored.

Online training for both the *Advanced Exam* is available through the IRS Link & Learn web site at <https://apps.irs.gov/app/vita/>. Click on the link "[Click here to see the content of each course](#)". **You should go to only the "Advanced Menu" topics.**

You will receive a printed copy of IRS Publication 4012 in your training materials. IRS Publication 4491, the *VITA/TCE Training Guide* is available only online this year. IRS Publication 4942 (training material for HSA), is not available as a printed document. Electronic versions of all these documents are available at [www.irs.gov](http://www.irs.gov), and you will always find the most up to date version there.

When you are ready to start your tests, the URL for the test site is:

<https://www.linklearncertification.com/>



If you had an account last year, you can login using your old Login Name and Password. If you cannot remember your password, click “[CLICK HERE](#)” just below “Forgot Password”. A new password will be sent to the e-mail address that is on record.

If you’ve forgotten your Login Name or changed the e-mail address on record, follow the instructions for new counselors.

New counselors will have to create an account the first time they visit the site. Click on “Create Account” which will take you to the screen image on the next page. Follow the instructions below carefully; failing to do so could get you “off in the weeds.”

[Create a new account](#)

**VITA/TCE Central** IRS

Home

### Self-Registration

Complete the fields below to create your account in the system. Required fields are marked by an asterisk (\*), all other are optional.

\* Group:

\* Do you want to take the Site Coordinator course?  Yes  No

\* Training Source:

\* First Name:

\* Last Name:

SEID:  (For IRS Employees Only)

\* Login:

\* Password:

\* Confirm password:  Password Complexity Requirements

\* Email Address:

\* Confirm Email Address:

**PLEASE NOTE:** Should you ever forget your password, a valid email address is required to have a new one sent to you.

\* Address 1:

Address 2:

\* City:

\* State / Province:

\* Postal Code:

\* Time Zone:

\* Years You Have Volunteered:

Professional Status:

PTIN Number:  PTIN Validation Information

**PLEASE NOTE:** Enter your PTIN as it appears on your PTIN card; however, do not include a hyphen.

[Register](#)

1. For “Group”, select “2- TCE – AARP Volunteer”
2. Check “No” for “Site Coordinator” **even if you are an LC.**
3. For Training Source, select “Publication 4491”.
4. Complete the remaining fields with your information.
5. All fields with a ‘\*’ must be completed.

Leave the “SEID” field blank, it is for IRS employees only.

Complete the Professional Status and PTIN Number fields only if you will be seeking continuing education credits.

Make sure that you record your Login (user name) and Password.

When you have completed all fields, click REGISTER.

You can now log in using your new Login and Password. This is the entry page.

**For returning counselors, go to “My Account” and update the years of service and any other information that may have changed.**

Link & Learn - My Account x

https://www.linklearncertification.com/d/edit\_registration\_irs/

2015 VITA/TCE Certification Test My Account

### My account details

Required fields are marked by an asterisk (\*), all other are optional.

\* Group: 08 - IRS Employee - VITA/TCE

\* Site Coordinator:  Yes  No

\* Training Source: Link and Learn Taxes (e-Learning)

\* First Name: Robert

\* Last Name: Francis

SEID: (For IRS Employees Only)

\* Login: rffranc

Password: Change Password

\* Email Address: rffranc@comcast.net

\* Confirm Email Address: rffranc@comcast.net

PLEASE NOTE: Should you ever forget your password, a valid email address is required to have a new one sent to you.

\* Address 1: 4916 Friar Ave

Address 2:

\* City: Fremont

\* State / Province: California

\* Postal Code: 94555

\* Time Zone: (GMT-08:00) Pacific Time US & Can

\* Years You Have Volunteered: 7

Continuing Education (CE) Credit: Select a CE Credit Role

PTIN Number: PTIN Validation Information

PLEASE NOTE: Enter your PTIN as it appears on your PTIN card; however, do not include a hyphen.

Save

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Click “Save” when finished editing. This will return you to the Home page.

Click on the “Advanced” tab. The “Basic” tab is for VITA only.



## Advanced tab options

2015 VITA/TCE Certification Test My Account

Basic **Advanced** Military International Puerto Rico Foreign Student

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	
<a href="#">2015 Volunteer Standards of Conduct - Exam</a>			0	If you would like to review the Volunteer Standards of Conduct course, click here to review the course in PDF format.  Click here to review the Intake/Interview & Quality Review training.
<a href="#">2015 Intake/Interview and Quality Review Exam</a>			0	
<a href="#">2015 Advanced Exam</a>			0	
<a href="#">2015 Health Savings Accounts (HSA) Exam</a>			0	

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From here you can

- ❖ Review the “Volunteer Standards of Conduct” training
- ❖ Review the “Intake/Interview and Quality Review” training
- ❖ Take the “Volunteer Standards of Conduct” exam
- ❖ Take the “Intake/Interview and Quality Review” exam
- ❖ Take the “Advanced” exam
- ❖ (Optionally) Take the “Health Savings Accounts (HSA)” exam

The tests must be taken and passed in this order

Volunteer Standards of Conduct

Intake/Interview and Quality Review

Advanced

Health Savings Accounts (HSA) (Optional, and can be postponed until later)

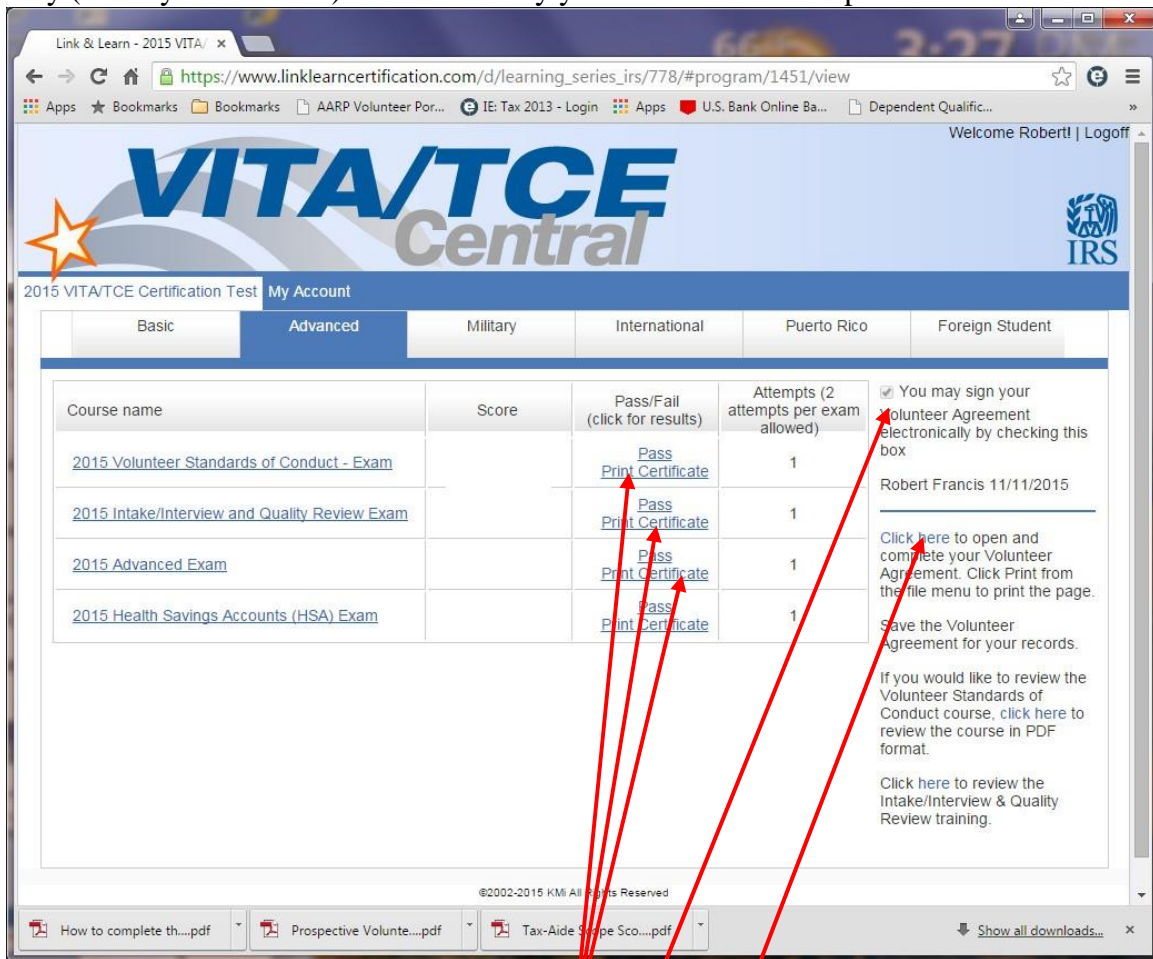
You do not have to complete a test in one sitting. You can close the test at any point, log off and then log back on at a later time. The software will remember your progress in the test.

If you do not pass a particular level, you must take and pass the Retest for that level.

When you have completed and passed all exams, you can view your Volunteer Agreement and then both print and save it.

Cancellation of Debt is now included in the “Advanced” certification.

Once you have completed the tests, send an electronic copy of your Volunteer Agreement only (not any Certificates) as instructed by your District leadership.



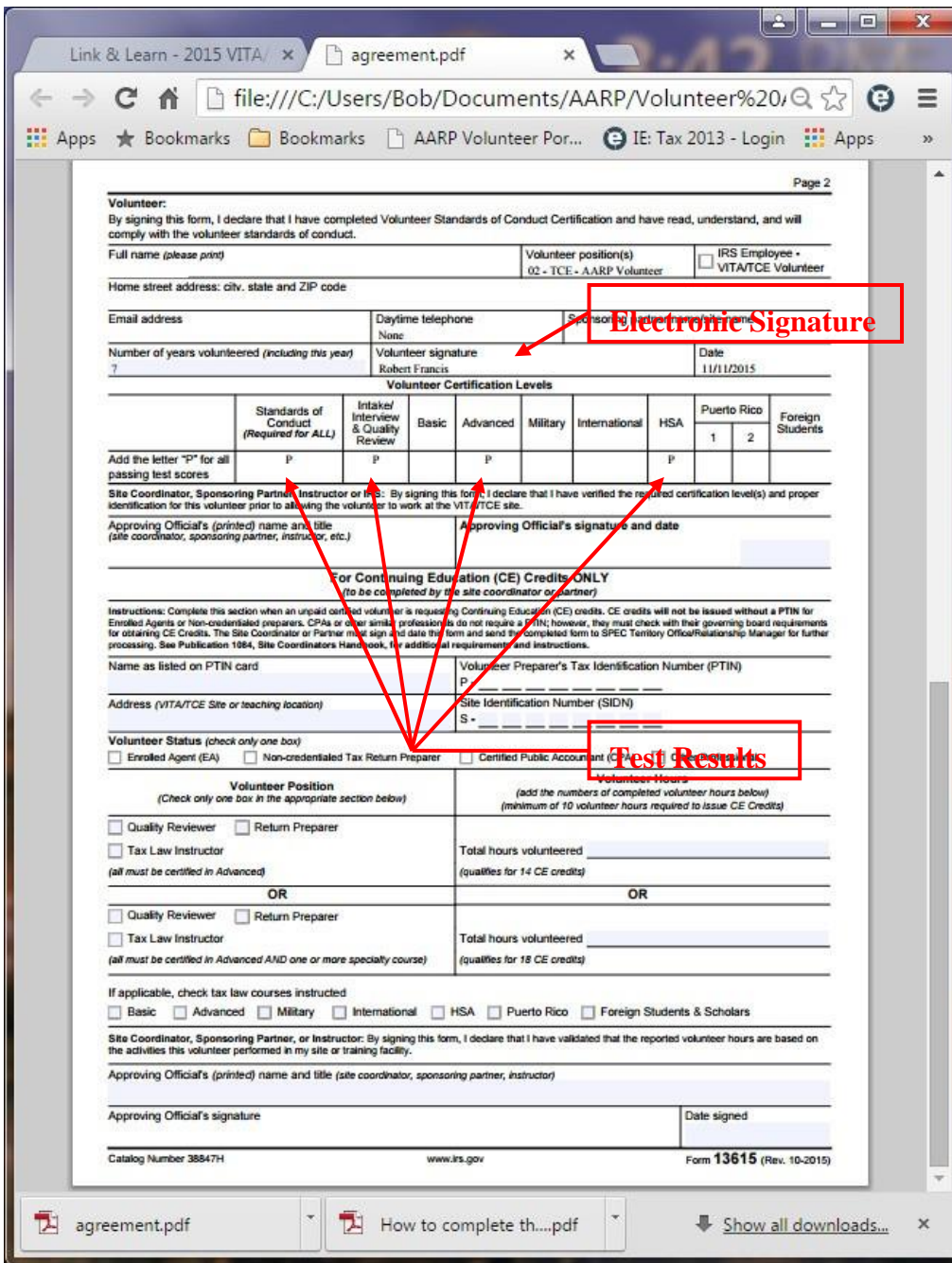
**Do NOT use the “Print Certificate” links**

Check the “You may sign...” box (your electronic signature)

Click this link

Clicking the link creates a file named “agreement.pdf”. It contains an electronic copy of your Volunteer Agreement, IRS Form 13615. Save this file on your computer. Page 2 of the form has your electronic signature as well as the results of your tests.

Volunteer Agreement, page 2 - (Link & Learn document “agreement.pdf”)



NOTE: The test results show only Pass/Fail. Your instructor will not see your actual test scores.

There is no need to print the Volunteer Agreement and it has already been signed electronically. Just send your instructor the electronic copy attached to an e-mail as instructed.