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 <u>www.irs.gov</u>.

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 <u>https://apps.irs.gov/app/vita/</u>. Click on the link "<u>Click here to see the content of each course</u>". **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 <u>www.irs.gov</u>, 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 "<u>CLICK HERE</u>" 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	VTCE Central	IRS
Home		
Self-Registration		
Complete the fields below to create you	ur account in the system. Required fields are marked by an asterisk (*), all other are optional.	
* Group:	Select a group	
* Do you want to take the Site Coordinator course?	© Yes⊛ No	
* Training Source:	Select a training source •	
* First Name:		
* Last Name:		
SEID:	(For IRS Employees Only)	
* Loois		
* D		
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:	Select a State / Province *	
* Postal Code:		
* Time Zone:	Select a time zone	
* Years You Have Volunteered:	Select *	
Professional Status:	Select a 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.

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2015 VITA/TCE Certification Test My Account		
My account details		
Required fields are marked by an asterisk (), all other are optional.	
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* Site Coordinator:	⊙ Yes⊛ No	
* Training Source:	Link and Learn Taxes (e-learning)	
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* 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.	
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Address 2:		
* City:	Fremont	Veers you have
* State / Province:	California	rears you have
* Postal Code:	94555	volunteered
* Time Zone:	(GMT-08:00) Pacific Time (ies & 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.	
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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

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2015 Advanced Exam				0	
2015 Health Savings Accou	nts (HSA) Exam			0	
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✤ (Optionally)	Take the	Health S	avings Acco	ounts (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.



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")

🖈 Bookmarks									1	Page 2
Volunteer: By signing this form, I de	clare that I have con	npleted V	olunteer Sta	ndards of Co	nduct Cer	lification and h	ave read,	understa	nd, and wi	a
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Add the letter "P" for all passing test scores	Р	P		Р			Р			
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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.