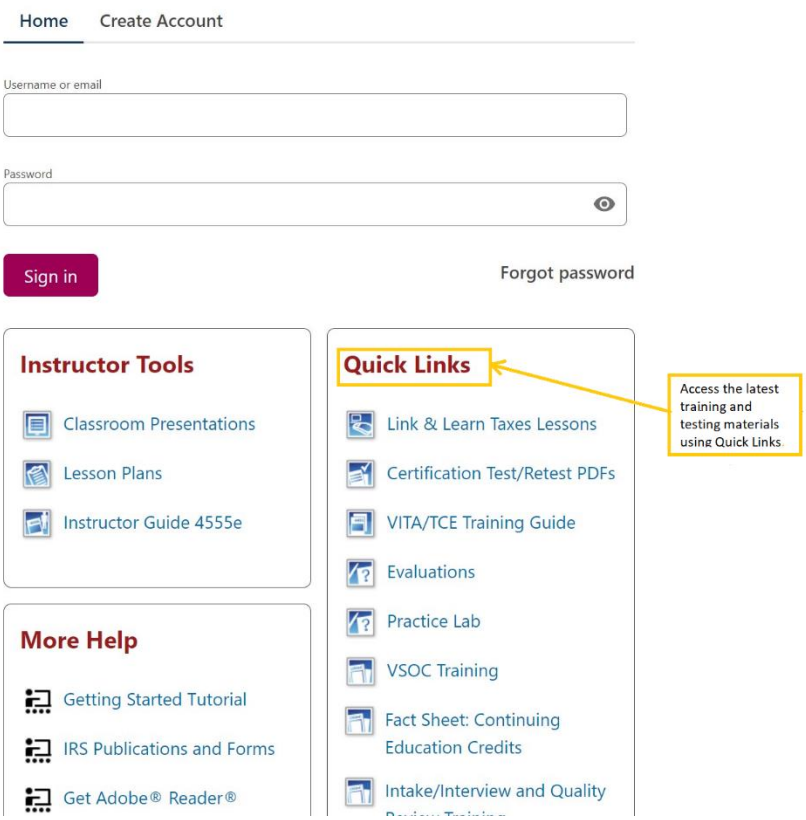
Link & Learn Taxes

Certification Tests: Getting Started

VITA/TCE Central

Thank you for accessing the Link & Learn Taxes certification test site. Beginning FS 2023, all volunteers will be required to register and certify via Link & Learn Taxes. You can register and login into the test using VITA/TCE Central. In addition, return here to access the latest training and testing materials using Quick Links. Quick Links will include a file for all the certification tests and VITA/TCE training guides (including the optional specialty courses) in Adobe Acrobat PDF file format. In addition, you can access the Volunteer Standards of Conduct (VSOC) Training course, Intake/Interview and Quality Review Training, the Practice Lab, and the evaluations.

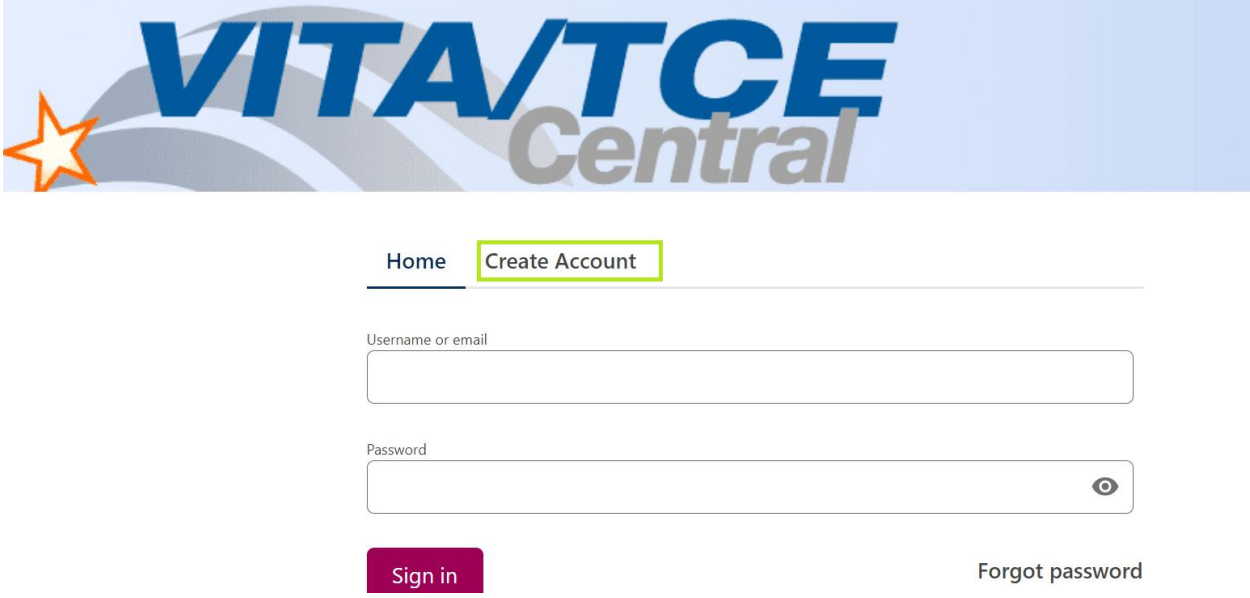


1. How to Register

To become certified for the VITA/TCE Programs, you must first self-register in the VITA/TCE Central testing system (your Practice Lab username and password will not work on the certification test site):

- Go to the VITA/TCE Central homepage at **https://www.linklearntaxescertification.com**. (Copy and paste into a browser and add to Favorites for easy access later.)

- Click the **Create Account** tab to set up a new IRS account. Volunteers are only allowed one account. Complete the fields to create your account in the system. Required fields are marked by an asterisk (*), but all others are optional.



- Group: Select the appropriate volunteer group from the choices available. You can select more than one group.
- If you want to take SPEC OPI Training, please select “Yes” to the question, “Do you want to take SPEC OPI Training?”. Saying Yes to that question will make the **Site Identification Number (SIDN)-SPEC OPI Training** field available.
- If you require activation of multiple OPI Pins, please select “Yes” to the question, “Do you require activation of multiple OPI Pins?”.
- If you are also a Site Coordinator, please select “Yes” to the question, “Do you want to take the Site Coordinator course?”. Saying Yes to that question will make the Site Coordinator Training document available.
- When registering, the questions: “Are you an instructor?” and “Are you an IRS SPEC Territory Manager?” default to No. Please select those roles if they pertain to you.
- Continue to fill in the registration form with your first and last name, address, email address, and other information.

- When registering, you must create a Login Name and password to use every time you return to VITA/ TCE Central. The same login and password can be used every tax season. Note that the Test site does not allow two users to have the same Login. You'll need a unique Login that is not currently in the system.

- Passwords are case sensitive.

- The system will allow only one account per email address. In case your email address has changed, you can update your email address by clicking on the My Account tab after logging in. If you already have an account, the system will not allow you to create a new account with the same email address. If you can't remember your old Login and/or password, use the "Forgot Password" link on the homepage and the site will send you an email with your Login Name and a link to reset the password.

- Should you ever forget your password, a valid email address is required to send you a new password.

- Optional: Professional Status. This field must be completed by all volunteers requesting IRS SPEC Continuing Education (CE) Credits. Non-credentialed tax return preparers must be participating in the Annual Filing Season Program to be eligible for SPEC CE Credits. Volunteers that certify by taking the Federal Tax Law Update test for Circular 230 must have a professional designation of Attorney, CPA, or Enrolled Agent.

- Optional: A PTIN is a "Preparer Tax Identification Number" issued by the IRS. If you have a PTIN, enter it in the appropriate place on the registration form. The PTIN must start with the letter P, followed by eight digits. Do not include a hyphen. If you do not have a PTIN, leave this field blank. Volunteers requesting CE Credits must provide a PTIN number except for Attorneys, CPAs, and CFPs.

Note: You can always update or change your personal information, group, professional status, email address, or password by clicking **My Account**.

VITA/TCE Central

IRS

Home | Create Account

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:
- [x] 01 - VITA Volunteer
- [x] 02 - TCE - AARP Volunteer
- [ ] 03 - TCE - Other Volunteer
- [ ] 04 - VITA - Military Volunteer
- [ ] 05 - IRS Employee - SPEC
- [ ] 06 - IRS Employee - Other
- [ ] 07 - Foreign Student Site Volunteer
- [ ] 08 - IRS Employee - Volunteer
- [ ] 09 - Federal Employee non-IRS employee
- [ ] 10 - SPEC OPI Volunteer
- [ ] 11 - Other

* Do you want to take SPEC OPI Training? (•) Yes ( ) No

* Site Identification Number(SIDN)-SPEC OPI Training
S12345678

* Do you require activation of multiple OPI Pins? ( ) Yes (•) No

* Do you want to take the Site Coordinator certification? ( ) Yes (•) No

* Are you an Instructor? ( ) Yes (•) No

* Are you an IRS SPEC Territory Manager? ( ) Yes (•) No

* Do you plan to volunteer in the VITA/TCE Program? ( ) Yes (•) No

* Training Source
Link and Learn Taxes (e-learning)

* First Name
Mic

* Last Name
P

SEID

(For IRS employees Only)

* Username
micp

* Password
••••••••

* Confirm Password ?
••••••••

* Email Address
mic.p@gmail.com

* Confirm Email Address
mic.p@gmail.com

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

* Address 1
Test Address

Address 2

* City
Test City

* State / Provision
Alaska

* Postal Code
99540

Daytime Telephone Number

* Time Zone
(GMT-09:00) Alaska

Partner/Organization Name

* Years You Have Volunteered
2

Professional status for Continuing Education credits or Circ 230 ONLY
Select role for CE Credits

PTIN Number ?

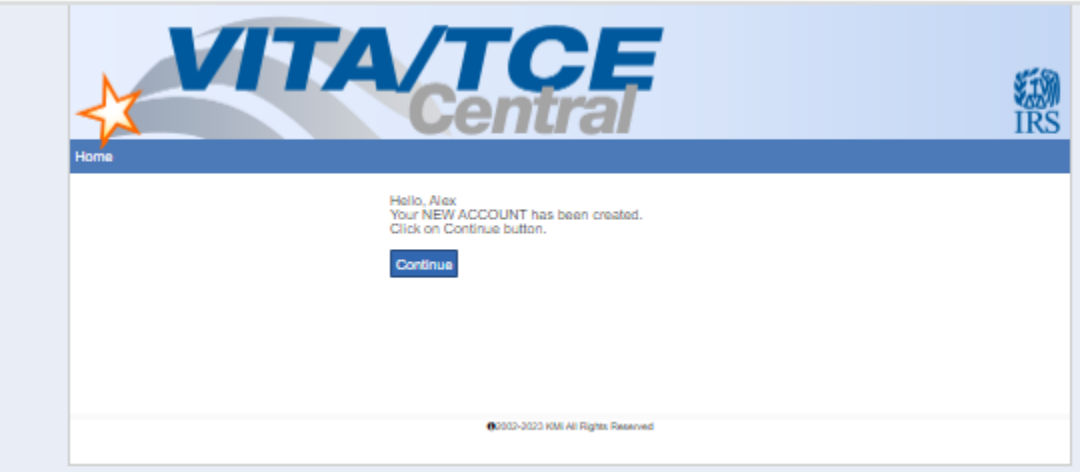
Name as listed on PTIN Card

CTEC Number ?

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

Register

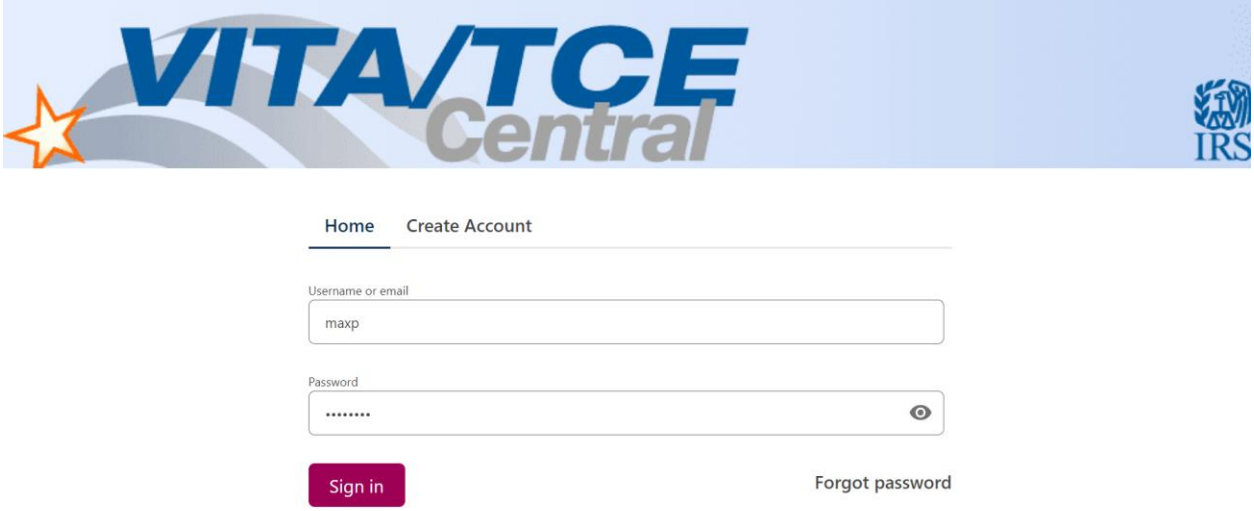
- Click on Register button once all the information is filled.



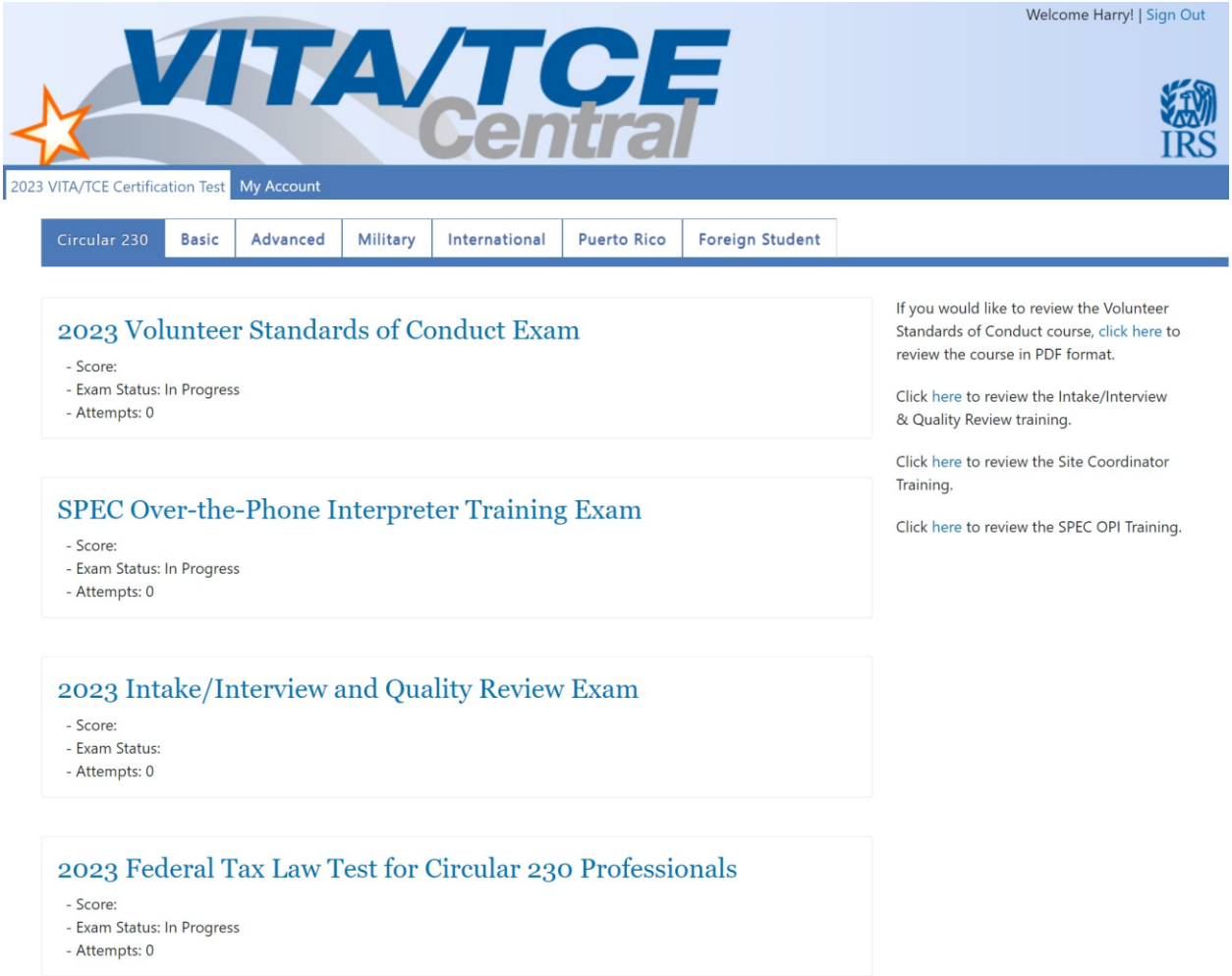
- Once registration is successful, above page should be displayed.
- Click on **Continue** button, it will **navigate to MY Account Details** page

2. Certification Login

- Once you create your Login Name and password, you can login to the Home page. Your password is case sensitive.



- After sign in user will be navigated to **VITA/TCE Certification Test** page.

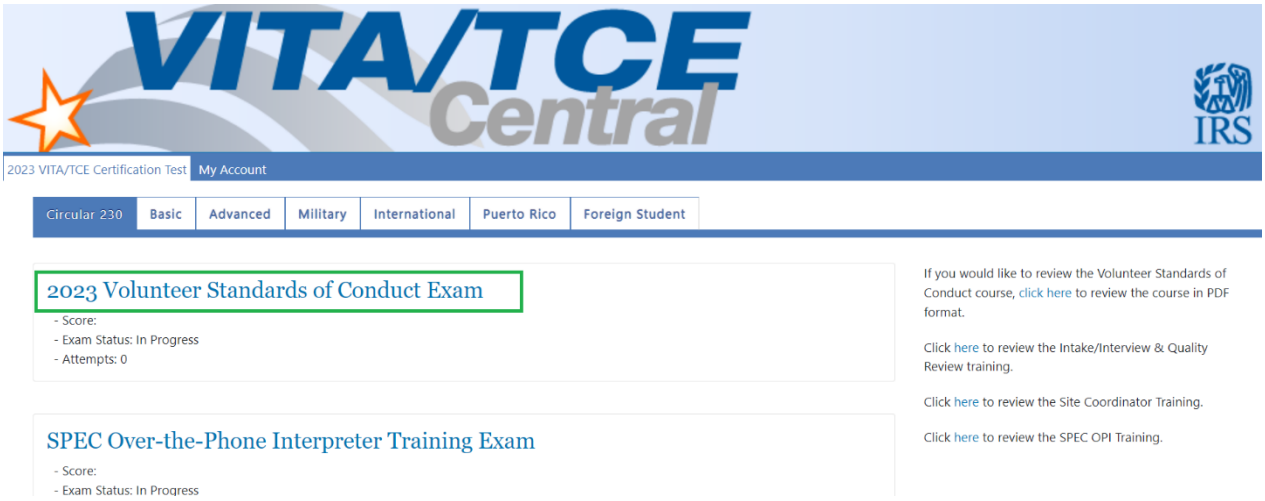


- User can see all the details like personal information, group, professional status, email address, or password by clicking **My Account** and can always update or change the details if required.

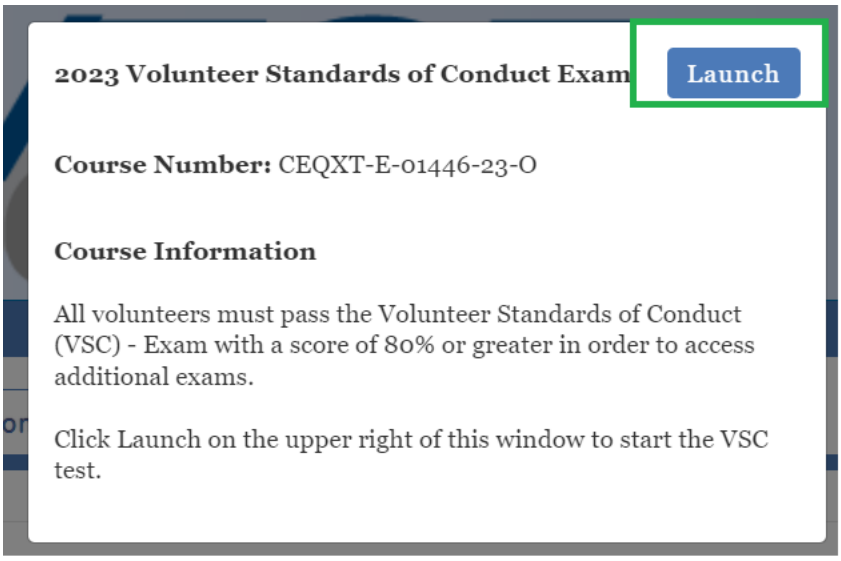
3. Volunteer Standards of Conduct Exam

To participate in the VITA/TCE program, first review the IRS Volunteer Standards of Conduct (VSOC) training course, which can be accessed on the VITA/TCE Central portal page. Then, you must pass the Volunteer Standards of Conduct (VSOC) test:

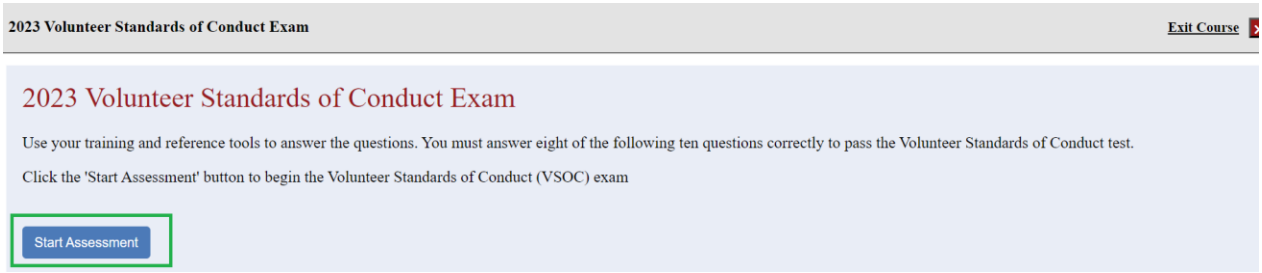
- Click on a tab for your course of training, such as Basic, Advanced, Military, or International. All tabs include a link to the VSOC exam.



- In the first column, under the heading “Course name,” click on the link for **Volunteer Standards of Conduct - Exam**. This opens a description dialog box. Within this window, click **Launch** on the upper right to start the exam.



- Follow the instructions within the exam. You'll begin the exam by clicking the **Start Assessment** button. See the topic below on Taking VITA/TCE Certification Tests for more information on navigating through exams.



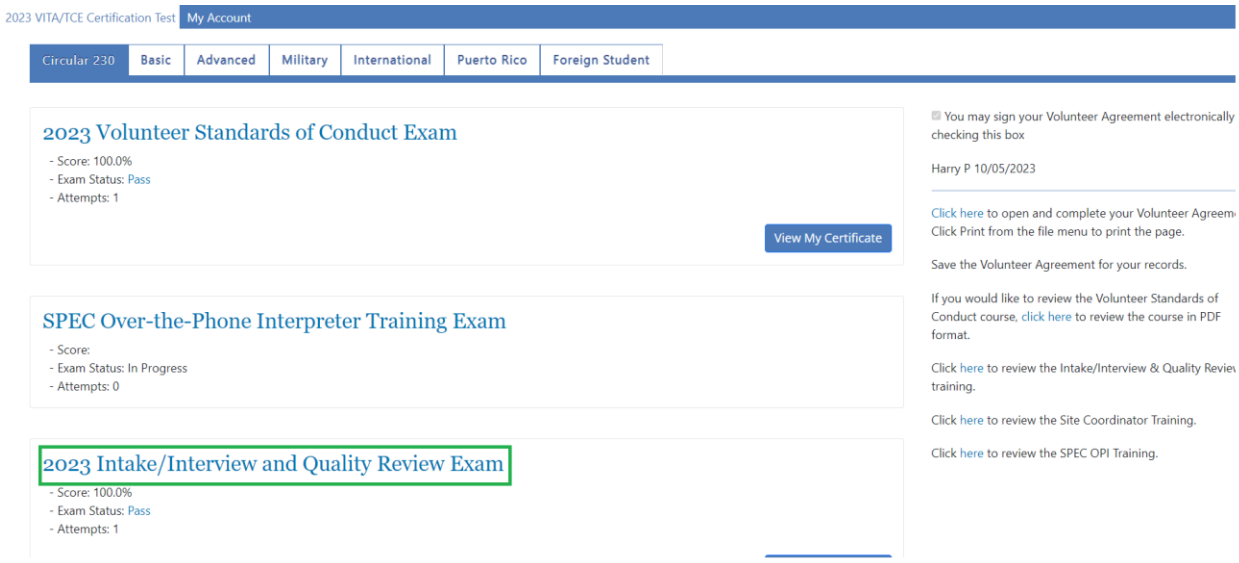
• You must pass the VSC Exam with a score of 80% or greater. If you fail the exam, you may review the VSC lesson and take the exam again. The exam questions may be different on the second attempt.

• When you pass the exam, click on **View My Certificate** button present below the course name and click on **Print Certificate** for a certificate of completion.

4. Intake/Interview & Quality Review Exam

- All tax preparers, Quality Reviewers, Instructors, and Site Coordinators must pass the Intake/Interview and Quality Review test. First review the Intake/Interview and Quality Review Training course located under “Quick Links” on the VITA/TCE Central portal page. Then, log in to the test center and click on the link to the Intake/Interview and Quality Review Exam.

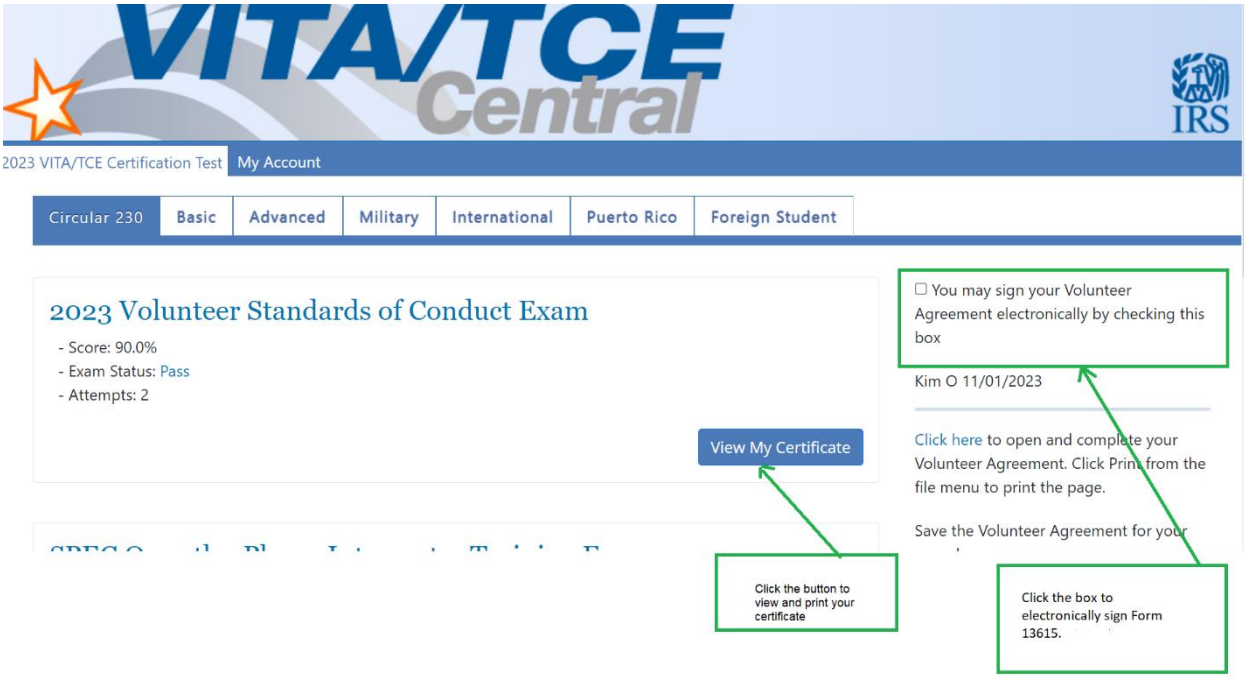
- You must pass the 10-question exam with a score of 80% or greater. If you fail the exam, you may review the Intake/Interview and Quality Review Training and take the exam again. The exam questions may be different on the second attempt.



5. Signing Your Form 13615, Volunteer Agreement

After passing any of the exams, you may sign your Form 13615, Volunteer Standards of Conduct Agreement – VITA/TCE Programs:

- Click the check-box next to the statement, “You may sign your Volunteer Agreement electronically by checking this box.” A record of your digital signature will be included in a report to your Site Coordinator.



Open your **Form 13615** as a PDF by clicking **Click here** to open and complete your Volunteer Agreement.

- All completed and passed exams are entered automatically on page 2 of the form.
- All the information from your registration page will transfer to Form 13615.
- The sponsoring partner/site name and approving official name and title can be manually completed by volunteers.
- You may print this document at any time.

After completing all the exams, you plan to take, print or save Form 13615, read and sign it, and return it to your sponsor or Site Coordinator. Form 13615 must be signed and dated by the Site Coordinator, sponsoring partner, instructor, or IRS contact. The site coordinator must verify your name and address with your government issued photo identification and confirm you have completed the required training and certification prior to working at a site. Electronic, typed, or manual signatures are allowed for Form 13615. When you complete the online certification test,

you will automatically be included on a list of certified volunteers. More information on Standards of Conduct can be found in Publication 4961, VITA/TCE Volunteer Standards of Conduct – Ethics Training.

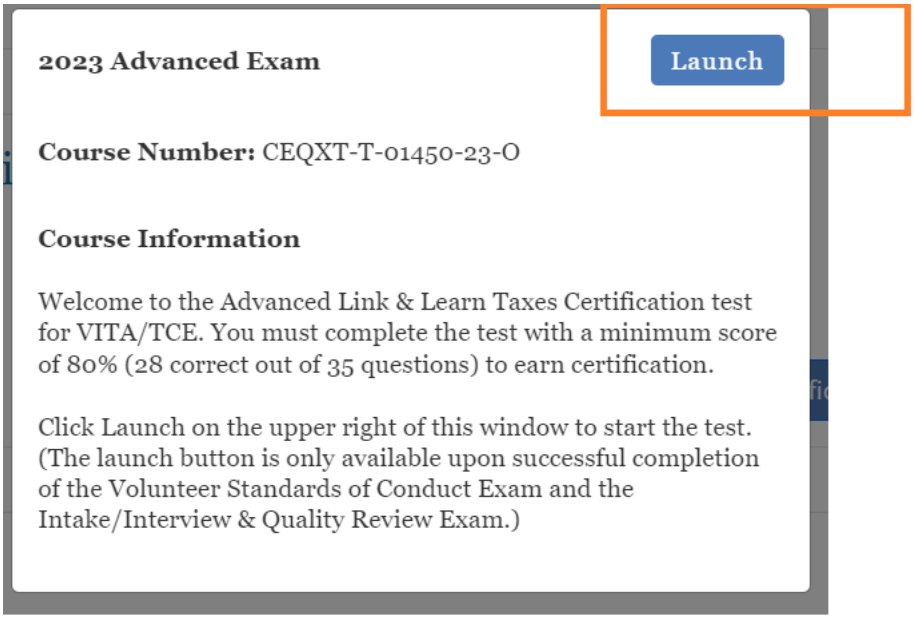
6. Taking VITA/TCE Certification Tests

The test scenarios on VITA/TCE Central are the same as in the printed test booklet (Form 6744, VITA/ TCE Volunteer Assistor's Test/Retest). Volunteers taking the test will be presented with the test from the 6744. If volunteers fail an exam, the retest will be presented on the second attempt.

Volunteers preparing tax returns must pass either the Basic or Advanced certification test. Note that Basic and Advanced are standalone certifications; it is not required to take the Basic exam if you wish to certify in Advanced. A minimum score of 80% is required to pass each certification test. Only volunteers who have passed the Advanced exam may choose to test for the Military and International certifications. The new Site Coordinator test is an annual requirement. Site coordinators must achieve a passing score of 80% or higher prior to the site opening. You are allowed two attempts to take each exam.

To take an exam:

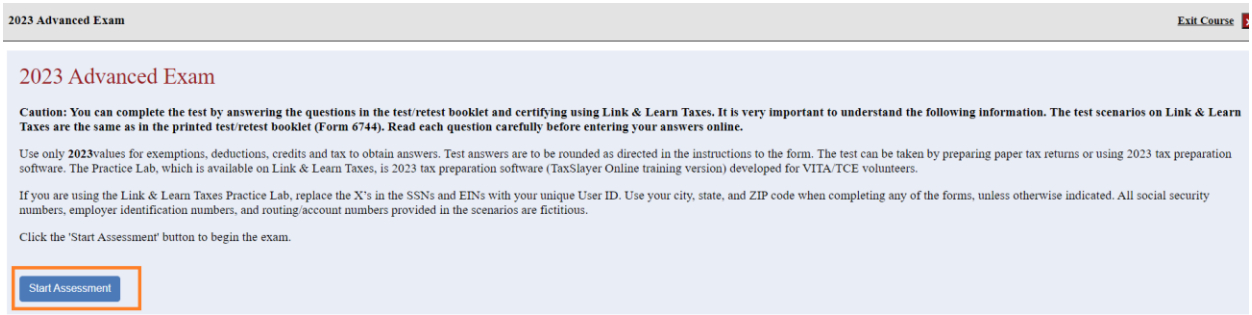
- Click on the tab for the certification path you want to complete. All the exams available for each certification path will be listed under the corresponding tabs.
- In the 2023 VITA / TCE Certification Test page, click the link for your exam to open a description. Click **Launch** in the upper right corner of the description window to open the exam.



- If there is no Launch button, then you have not completed and passed the prerequisite(s). For example, you cannot take the Basic or Advanced Exam before passing both the VSOC Exam and the Intake/Interview & Quality Review Exam. You must register as a site coordinator for the Site Coordinator course and exam to appear.

- After launching an exam, you'll get an introduction page to the exam, which has useful information and may have links to tax tables or course scenarios. Open these PDF documents if available and either leave them open on your computer for reference or print them out.

- After reading the information on the introduction, click the Start Assessment button.



To navigate within a certification test, use the simple controls available on each test screen.

– **Back**: Takes you to the previous screen or question

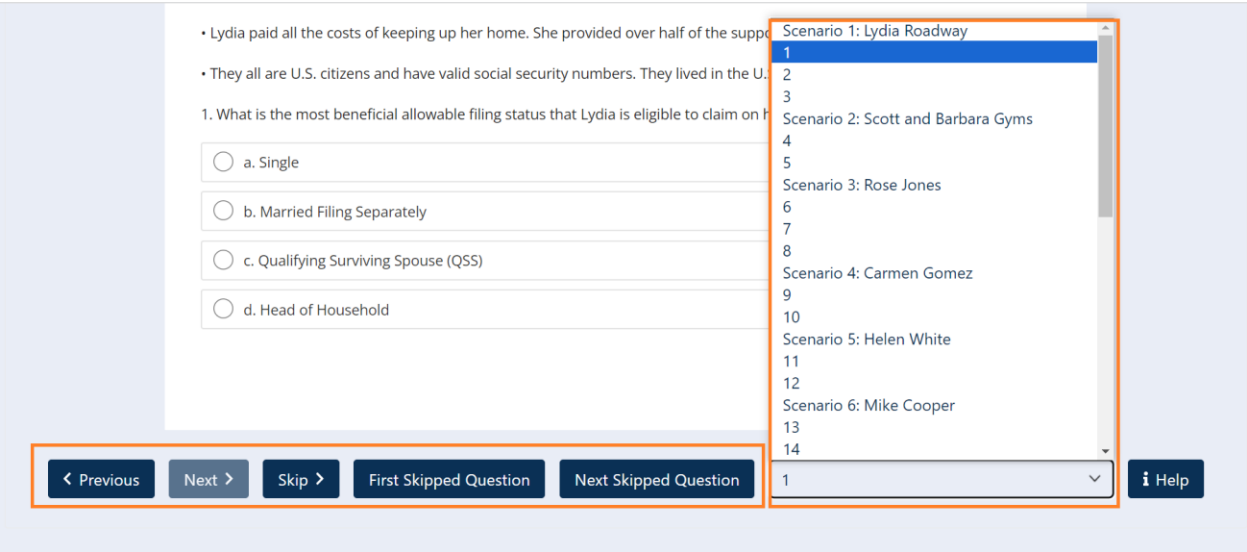
– **Next**: Takes you to the next screen or question

– **Skip**: Allows you to skip a question and come back to it later

– **First Skipped Question**: Returns to the first test question that you have not answered

– **Next Skipped Question**: Takes you to the next test question that you have not answered

– **Question Drop-down Menu**: Allows you to jump directly to any question, as listed under each scenario in the test



- You cannot use Next or Back without answering the question on the screen. If you want to skip the question temporarily and move to the next question, click the Skip button. If you want to return to the Scenario description, click on the Scenario listed on the Question Drop-down Menu.

TIP

For fill-in-the-blank questions:

- Enter numbers. Do not enter dollar signs, commas, periods, or decimal points. For example, for “nineteen thousand dollars” enter: 19000
- Enter negate numbers using the minus sign on your keyboard.
- Round decimals up or down to the nearest whole number.

- You may stop and close the test at any time and come back to finish.

- When you have reached the end of the exam, you’ll see a Review screen, which is the last screen before you submit your answers.

Advanced Scenario 9: David MacLee	
30. What is David's most advantageous filing status?	a. Single
31. David MacLee's adjusted gross income on his Form 1040 is _____.	b. $36,000
32. David can not claim which of the following credits on his tax return.	b. Credit for Other Dependents
33. David's retirement savings contributions credit on Form 8880 is $_____. (Note: whole number only, do not use special characters.)	100
34. The total amount of David's net premium tax credit on Form 1040 Schedule 3, line 9 is $696.	b. False
35. David's child and dependent care credit from Form 2441 is reported as a non-refundable credit on Form 1040, Schedule 3.	b. False

Back | Next > | First Skipped Question | Next Skipped Question | Review | Help

This Review screen summarizes all the questions and your selected answers and alerts you if you have any unanswered questions. You may return to any question to change your answer if desired before you submit your test for

scoring; simply click on the desired question from the Question Drop- down Menu at the bottom of the page or use the Back button.

When you are satisfied with your answers, click the **Submit** button in the Review screen at the bottom of the page to score your test.

30. What is David's most advantageous filing status?	a. Single
31. David MacLee's adjusted gross income on his Form 1040 is _____.	b. $36,000
32. David can not claim which of the following credits on his tax return.	b. Credit for Other Dependents
33. David's retirement savings contributions credit on Form 8880 is $_____. (Note: whole number only, do not use special characters.)	100
34. The total amount of David's net premium tax credit on Form 1040 Schedule 3, line 9 is $696.	b. False
35. David's child and dependent care credit from Form 2441 is reported as a non-refundable credit on Form 1040, Schedule 3.	b. False

Back | Submit | First Skipped Question | Next Skipped Question | Review | Help

After clicking Submit, the Certification Test Results screen will be displayed. On this screen, you can view:

– Your total score for the exam (at the bottom of the screen).
– The result for each question.

– Feedback for incorrect questions, along with links to the Link & Learn Taxes lesson with the information needed to answer the test question. This is your personalized review lesson; use these links to study specific content as needed.

2023 Advanced Exam

The assessment is finished. Your score is less than the 80% passing score. You are allowed 2 attempts to take the test.

Your Results:

Advanced Scenario 1: Lydia Roadway		
1. What is the most beneficial allowable filing status that Lydia is eligible to claim on her 2023 tax return?	Incorrect	Review the Publication 4491, Filing Status lesson and Publication 4012, Tab B: Starting a Return and Filing Status.
2. Based on the information provided, Lydia qualifies for the earned income credit.	Correct	
3. Lydia is required to report her lottery winnings as income on her federal tax return.	Incorrect	Review the Publication 4491, Gambling Winnings lesson and Publication 4012 Tab D, F and O .

- Close the assessment window by clicking on the X in the upper right corner. VITA/TCE Central updates immediately to show you your score and whether you passed or failed the exam. A passing score allows you to print a certificate for that exam. Your online Form 13615 is also updated automatically.

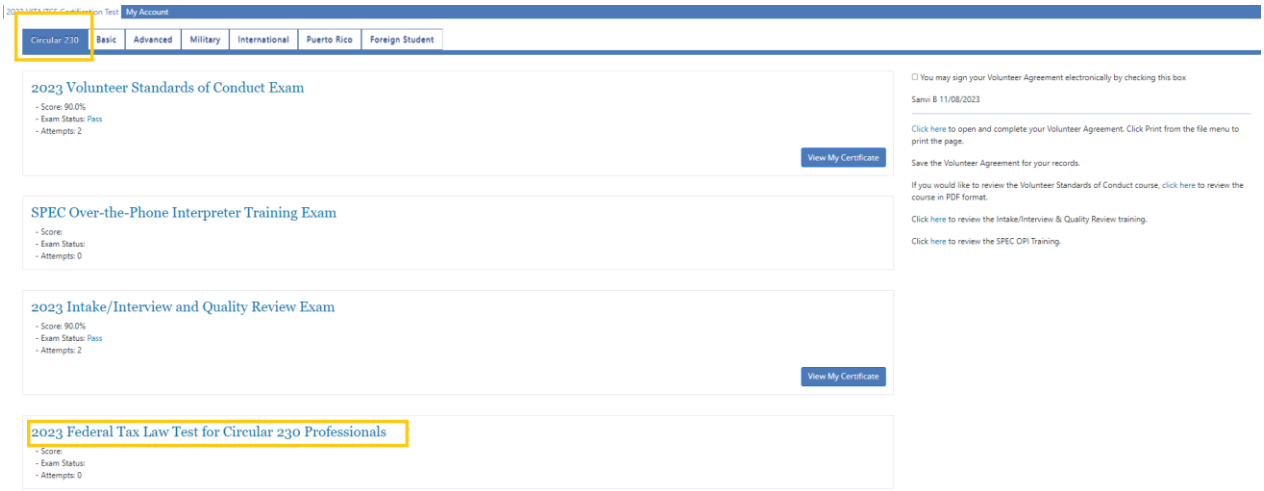
- If you do not pass the test the first time, you may review the course material and then take the retest. You are allowed only two attempts to pass any test. Tests cannot be reset after failed attempts.

7. Circular 230 Federal Tax Law Updates Test

- If you are a volunteer who is authorized under Circular 230 to practice before the IRS, there is an:
  - Optional Circular 230 Federal Tax Law Updates Test. Volunteers who complete this optional certification level can prepare any tax returns that fall within the scope of service of the VITA/TCE Programs without taking additional exams. Note: This certification does not qualify volunteers for Continuing Education (CE) Credits.

- All volunteers are required to complete the Volunteer Standards of Conduct (VSOC) test and the Intake/Interview & Quality Review test before taking the Circular 230 Test or other exams.

- The test must be passed with a minimum score of 80%



8. Puerto Rico Tests

- All volunteers are required to complete the Volunteer Standards of Conduct (VSOC) test and the Intake/Interview & Quality Review test before taking other exams.
- Click the Puerto Rico tab to access the Puerto Rico tests.
- Volunteers must pass the Basic Exam (or Advanced Exam) before proceeding to the Puerto Rico Level I exam.
- Volunteers may proceed to Puerto Rico Level II exam after certification in Puerto Rico Level I.
- You should take either the English or Spanish Puerto Rico test, but not both.
- Each test must be passed with a minimum score of 80%.

9. Foreign Student Test

- All volunteers are required to complete the Volunteer Standards of Conduct (VSOC) test and the Intake/Interview & Quality Review test before taking other exams.

- Click the Foreign Student tab to access the test. This tab is found to the right of the Puerto Rico tab. If you don't see the tab, roll your cursor over the area to the right of the Puerto Rico tab. Click the arrow and the Foreign Student tab will appear.

- The test must be passed with a minimum score of 80%.

10. Site Coordinator Course

- All volunteers, including Site Coordinators, are required to complete the Volunteer Standards of Conduct (VSOC) test and the Intake/Interview & Quality Review test before taking other exams.

- Volunteers registered as Site Coordinators are also required to complete the Site Coordinator training course. If you did not select the Site Coordinator training course when you registered, you can change your selection by clicking My Account.

- Click the Site Coordinator Course link to launch the course.

- You must complete the training by reviewing every screen in the course. Clicking on the "Exit Course" X button on the very last screen gives you credit for completing the training.

- A new certification test is required for Site Coordinators and Alternate Coordinators. This is an annual requirement.

11. Continuing Education Credit Certificate

- Certificates will be available to print on the VITA/TCE Central home page for each volunteer that has met all requirements of the program.
- All eligible volunteers are required to select a Professional Status on the My Account Page. A certificate will not generate if not selected.

12. References

For Quick Links to Volunteer Standards of Conduct Training, Intake/Interview and Quality Review Training, Link & Learn Taxes Lessons, Certification Test/Retest PDFs, Practice Lab, Evaluations, and more, return to the VITA/TCE Central home page.

Click here for guidance on Continuing Education Credits.

Click here for IRS Publications and Forms.

Click here for Adobe Reader.

For login problems or other technical issues, email the

Certification Test Help Desk at linklearnsupport@redcedarconsultancy.com