



# Link & Learn Taxes

## Certification Tests: Getting Started

### VITA/TCE Central

Thank you for accessing the Link & Learn Taxes certification test site. 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.

Access the latest training and testing materials using Quick Links.

- Use the “Forgot Password” link on the homepage if you can’t remember your Login Name and/or password and the site will send an email with your Login Name and a link to reset the password.

## 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 user name and password **will not** work on the certification test site):

- Go to the VITA/TCE Central homepage at <https://www.linklearncertification.com>. (Copy and paste into a browser, and add to Favorites for easy access at a later time.)
- Click the **Create Account** button to set up a new IRS 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 in the drop-down menu. You can select more than one group.

**VITA/TCE Central**

2019 VITA/TCE Certification Test My Account

### My account details

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

\* Group:

- 01 - VITA Volunteer
- 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 - Other

\* Do you want to take the Site Coordinator course?  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:  ▼

\* First Name:

\* Last Name:

SEID:  (For IRS Employees Only)

Select the appropriate volunteer group.

- If you are also a Site Coordinator, please select “Yes” to the question, Do you want to take the Site Coordinator course? You will then need to complete the Site Coordinator training course before you can complete your Basic or Advanced exams.
- 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 in order 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 with the exception of 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**.

The following personal information should be reviewed and updated yearly if changes have occurred:

- Email
- Group
- Years you have volunteered
- Site Coordinator status
- Professional status
- Daytime Telephone
- Partner/Organization Name
- Name listed on PTIN card (only if a PTIN number is provided)
- CTEC Number

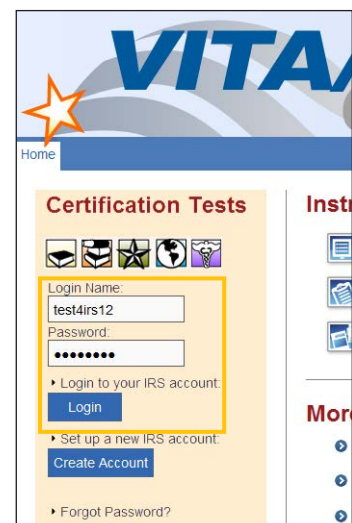
**TIP**

#### Problems with the Certification Test website?

- Try using the link [www.linklearncertification.com/d/](http://www.linklearncertification.com/d/)
- Try adding [www.linklearncertification.com](http://www.linklearncertification.com) as a “trusted site” in Internet Explorer.
- Use a different browser such as Google Chrome or Firefox.
- Make sure your browser settings have pop-up blockers turned off.
- Still having problems? For login problems or other technical issues, email the Certification Test Help Desk at [linklearnsupport@epsilonsystems.com](mailto:linklearnsupport@epsilonsystems.com) (include your name, address, and login name, if known)
- Sorry – technical support by telephone is not available.

## Certification Login

Once you create your Login Name and password, you can login to the Home page. Your password is case sensitive. Remember, Practice Lab is not associated with the certification test site, and your Practice Lab user name and password will **not** provide access to the tests.

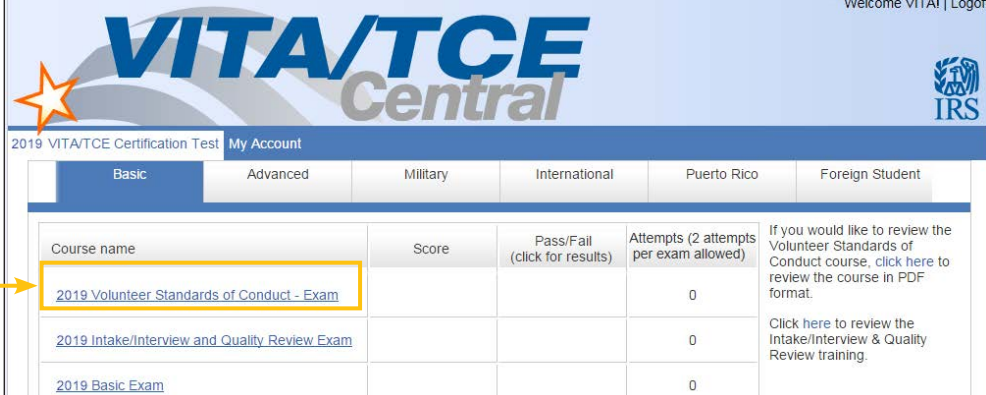


## Volunteer Standards of Conduct Training and Test

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.

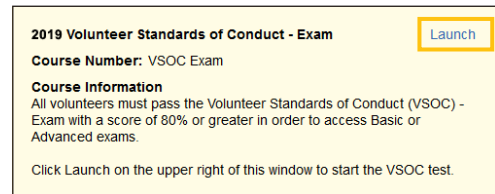
All volunteers must pass the VSOC test.



The screenshot shows the VITA/TCE Central portal interface. At the top, there is a navigation bar with '2019 VITA/TCE Certification Test' and 'My Account'. Below this is a tabbed interface with tabs for 'Basic', 'Advanced', 'Military', 'International', 'Puerto Rico', and 'Foreign Student'. The 'Basic' tab is selected. A table lists three courses: '2019 Volunteer Standards of Conduct - Exam', '2019 Intake/Interview and Quality Review Exam', and '2019 Basic Exam'. The first row is highlighted in yellow, and a yellow arrow points from the text 'All volunteers must pass the VSOC test.' to the link '2019 Volunteer Standards of Conduct - Exam'.

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	If you would like to review the Volunteer Standards of Conduct course, click here to review the course in PDF format.
<a href="#">2019 Volunteer Standards of Conduct - Exam</a>			0	Click here to review the Intake/Interview & Quality Review training.
<a href="#">2019 Intake/Interview and Quality Review Exam</a>			0	
<a href="#">2019 Basic Exam</a>			0	

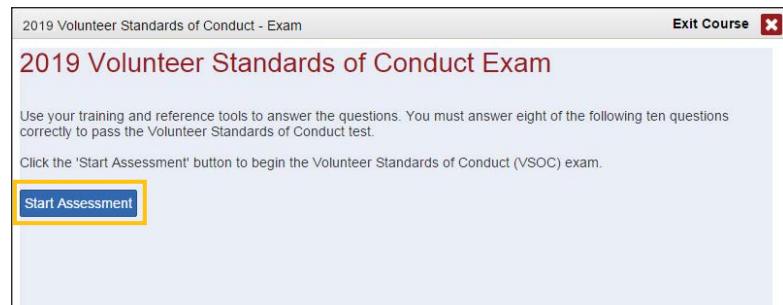
- In the first column, under the heading “Course name,” click on the link for **Volunteer Standards of Conduct - Exam**. This opens a description dialog box. Within this window, click **Launch** on the upper right to start the exam.
- Follow the instructions within the exam. You’ll begin the exam by clicking the **Start Assessment** button. See the topic below on Taking VITA/TCE Certification Tests for more information on navigating through exams.



The dialog box displays the following information:

- 2019 Volunteer Standards of Conduct - Exam** (Launch button)
- Course Number:** VSOC Exam
- Course Information:** All volunteers must pass the Volunteer Standards of Conduct (VSOC) - Exam with a score of 80% or greater in order to access Basic or Advanced exams.
- Click Launch on the upper right of this window to start the VSOC test.

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



The exam interface shows the title '2019 Volunteer Standards of Conduct Exam' and instructions: 'Use your training and reference tools to answer the questions. You must answer eight of the following ten questions correctly to pass the Volunteer Standards of Conduct test.' Below the instructions is a 'Start Assessment' button highlighted in a yellow box. An 'Exit Course' button is visible in the top right corner.

- When you pass the exam, click **Print Certificate** in the Pass/Fail column for a certificate of completion.

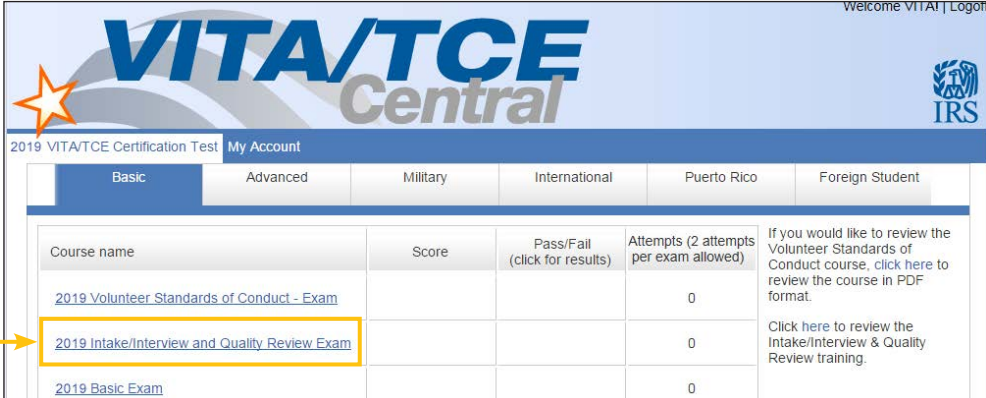
Note: The Volunteer Standards of Conduct Exam is a prerequisite to all other courses. If you do not pass this exam after the second attempt, you may not proceed to any other exams.

## 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.

It is not possible to take any of the other exams without first passing both the VSOC exam and the Intake/Interview and Quality Review exam.



Welcome VITA/T | Login

# VITA/TCE Central

2019 VITA/TCE Certification Test My Account

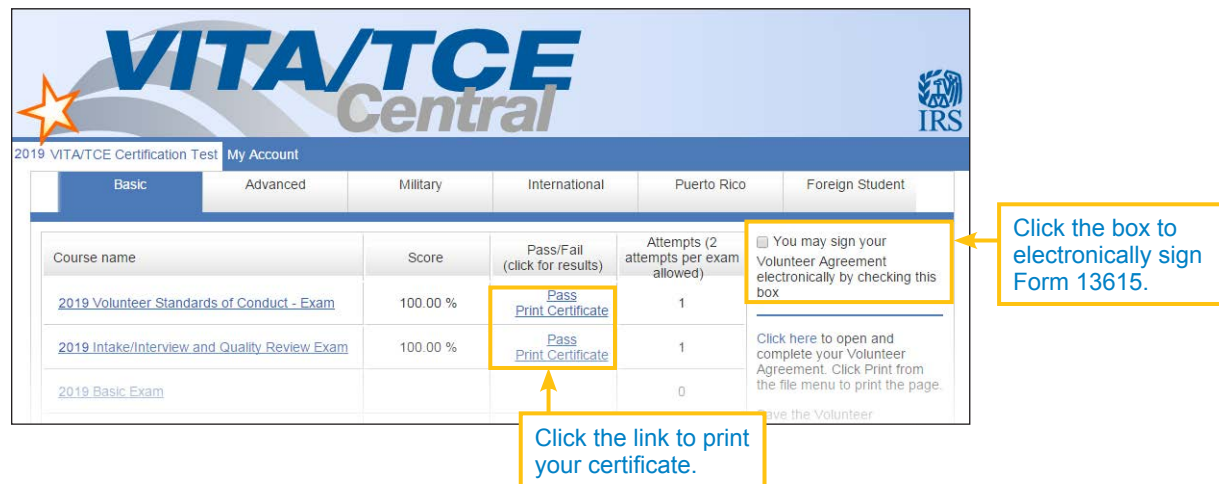
Basic	Advanced	Military	International	Puerto Rico	Foreign Student
Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	If you would like to review the Volunteer Standards of Conduct course, <a href="#">click here</a> to review the course in PDF format. Click here to review the Intake/Interview & Quality Review training.	
<a href="#">2019 Volunteer Standards of Conduct - Exam</a>			0		
<a href="#">2019 Intake/Interview and Quality Review Exam</a>			0		
<a href="#">2019 Basic Exam</a>			0		

All tax-preparation volunteers must pass this test.

## 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.



# VITA/TCE Central

2019 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)	<input type="checkbox"/> You may sign your Volunteer Agreement electronically by checking this box. Click here to open and complete your Volunteer Agreement. Click Print from the file menu to print the page.	
<a href="#">2019 Volunteer Standards of Conduct - Exam</a>	100.00 %	Pass <a href="#">Print Certificate</a>	1		
<a href="#">2019 Intake/Interview and Quality Review Exam</a>	100.00 %	Pass <a href="#">Print Certificate</a>	1		
<a href="#">2019 Basic Exam</a>			0		

Click the link to print your certificate.

Click the box to electronically sign Form 13615.



- 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 out 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, verifying your identity and that you have completed the required training and certification prior to working at a site. 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 4299, Privacy, Confidentiality, and Civil Rights – A Public Trust.

The screenshot shows the VITA/TCE Central website interface. At the top, there is a navigation bar with the VITA/TCE Central logo and the IRS logo. Below the navigation bar, there is a section for "2019 VITA/TCE Certification Test" with a "My Account" link. A table lists the certification paths: Basic, **Advanced** (highlighted), Military, International, Puerto Rico, and Foreign Student. Below this, a table shows exam results:

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)
<a href="#">2019 Volunteer Standards of Conduct - Exam</a>	100.00 %	Pass <a href="#">Print Certificate</a>	1
<a href="#">2019 Intake/Interview and Quality Review Exam</a>	100.00 %	Pass <a href="#">Print Certificate</a>	
<b><a href="#">2019 Advanced Exam</a></b>			

A pop-up window titled "2019 Advanced Exam" is displayed over the table. It contains the following information:

- Course Number:** None
- Course Information:** Welcome to the Advanced Link & Learn Taxes Certification test for VITA/TCE. You must complete the test with a minimum score of 80% (32 correct out of 40 questions) to earn certification.
- Instructions:** Click Launch on the upper right of this window to start the test. (The launch button is only available upon successful completion of the Volunteer Standards of Conduct Exam and the Intake/Interview & Quality Review Exam.)

A "Launch" button is visible in the top right corner of the pop-up window.

## 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. After your Basic or Advanced certification, you can test for the optional Health Savings Account (HSA) certification. Only volunteers who have passed the Advanced exam may choose to test for the Military and International certifications. You are allowed two attempts to take each exam.

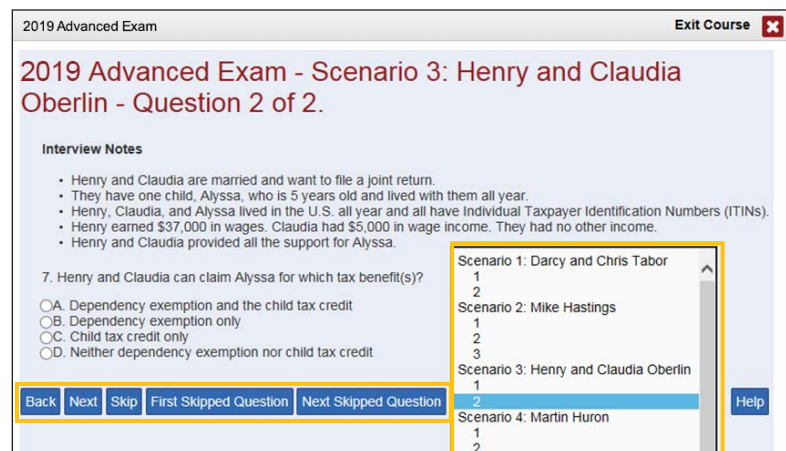
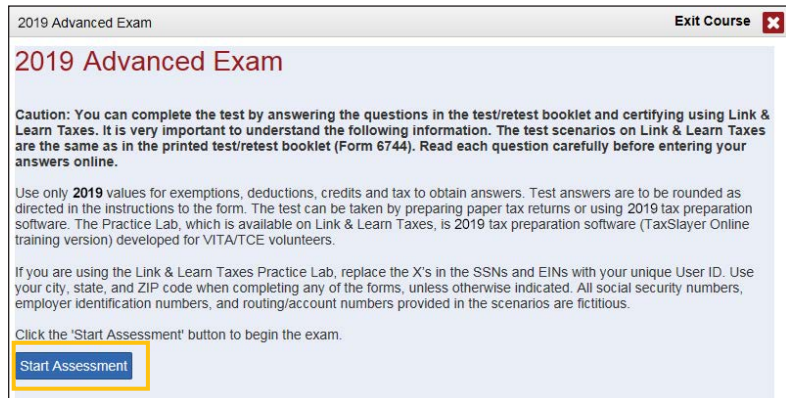
To take an exam:

- 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 Course Name column, 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 necessary 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. If you registered as a Site Coordinator, you must complete the Site Coordinator course before proceeding to the Basic or Advanced exam.
- 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**.
- 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.

**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 negative numbers using the minus sign on your keyboard.
- Round decimals up or down to the nearest whole number.



- 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.

19. What is the total amount of the residential energy credit from Form 5695 for the Albrights? \$\_\_\_\_\_

20. Lily says that they have a balance due on their return every year. What can you suggest to prevent or decrease the amount they owe when they file next year?

Back SUBMIT First Skipped Question Next Skipped Question

Review

19. What is the total amount of the residential energy credit from Form 5695 for the Albrights? \$\_\_\_\_\_

20. Lily says that they have a balance due on their return every year. What can you suggest to prevent or decrease the amount they owe when they file next year?

Back SUBMIT First Skipped Question Next Skipped Question

Review



**For iPad or tablet users:**

If the certification test window does not have a scroll bar and you cannot submit your test, close the window. Then, click the “In progress” link in the Pass/Fail column for that particular test. This reopens the test in a new window. Navigate to the final Review screen where you can click Submit.

- 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.
- 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.

• Lisa worked as a clerk and earned \$26,500.  
• Lisa and Oliver are U.S. citizens and have valid social security numbers.

10b. Is Lisa eligible to claim EIC?

**Scenario 6: James and Bridget Thurston**

11. What question on the Intake and Interview Sheet was marked incorrectly by the Thurstons based on the documents they provided?	Incorrect	Compare Intake and Interview Sheet to scenario information and documents. Review the Screening and Interviewing lesson. <a href="#">Click here to review the lesson.</a>
12. What is the Thurstons' standard deduction?	Correct	
13. Do the Thurstons qualify for the retirement savings contribution credit?	Correct	
14. James should report \$10,800 on Form 1040, line 20a.	Correct	

- 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.

## 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.
- This exam will appear **only** for volunteers with a professional designation of **Attorney, Certified Public Accountant (CPA), or Enrolled Agent** indicated in the Professional Status drop-down menu during registration. To confirm or change your professional status after you have registered, click on My Account and scroll to the bottom of the screen to access the Professional Status menu.
- 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 Circular 230 tab appears to the left of the Basic tab. If you don't see the tab, roll your cursor over the area to the left of the Basic tab. Click the arrow and the Circular 230 tab will appear. If you don't see the arrow, click My Account and confirm that you have a correct Professional Status selected from the drop-down menu.

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	<input checked="" type="checkbox"/> You may sign your Volunteer Agreement electronically by checking this box
<a href="#">2019 Volunteer Standards of Conduct - Exam</a>	100.00 %	Pass <a href="#">Print Certificate</a>	1	
<a href="#">2019 Intake/Interview and Quality Review Exam</a>				
<a href="#">2019 Federal Tax Law Update Test for Circular 230 Professionals</a>				

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

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	<input checked="" type="checkbox"/> You may sign your Volunteer Agreement electronically by checking this box
<a href="#">2019 Federal Tax Law Update Test for Circular 230 Professionals</a>	80.00 %	Pass <a href="#">Print Certificate</a>	1	

## 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%.

## Foreign Student Test

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- 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%.

## Site Coordinator Course

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- 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.
- The Site Coordinator Course is a prerequisite before Site Coordinators can proceed with any other exams.

## Continuing Education Credit Certificate

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- 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.

## References

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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 a brief video demonstration on [How to Register on the VITA/TCE Central Testing System](#).

Click here for a brief video demonstration on [Taking Certification Tests](#).

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@epsilonsystems.com](mailto:linklearnsupport@epsilonsystems.com)

