

## Taking the Tests Online

Volunteers have several Certification tests to complete with a passing grade in Link & Learn before they are certified to assist Tax Aide. The number of tests vary with the volunteer assignment. Listed below are the Mandatory tests required for the volunteer assignments.

### **Mandatory for Tax-Aide Client Facilitators**

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

### **Mandatory for Tax-Aide Counselors**

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

### **Optional**

The Qualified Expert Volunteer Exam (QEV) is an optional exam, which is recommended for Quality Review volunteers. It is not required by AARP and does NOT replace the Advanced Exam requirement. The QEV Exam does not provide the volunteer with CE credits.

Note: The previous *Health Savings Accounts (HSA) Exam* is now included in the Advanced Exam, so all certified Counselors will be certified for taxpayers with HSA accounts.

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 (VSOC Training) 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 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.**

IRS Publication 4012 *VITA/TCE Resource Guide* will be available in print form before the tax season begins. It is available electronically from [www.irs.gov](http://www.irs.gov) You should have received a copy of *IRS Publication 4491 VITA/TCE Training Guide*, with Pub 6744.

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

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

The screenshot shows the VITA/TCE Central website interface. The header includes the VITA/TCE Central logo, an orange star icon, and the IRS logo. Below the header is a navigation bar with a 'Home' link. The main content area is divided into three columns: Certification Tests, Instructor Tools, and Quick Links. The Certification Tests column contains a login form with fields for Login Name and Password, and buttons for Login, Create Account, and a link for Forgotten Password. The Instructor Tools column lists Classroom Presentations, Lesson Plans, and Instructor Guide 4555e. The Quick Links column lists various resources like Link & Learn Taxes Lessons, Certification Test/Retest PDFs, VITA/TCE Training Guide PDFs, Evaluations, Practice Lab, VSOC Training, and Intake/Interview and Quality Review Training. Annotations with blue arrows point from text boxes to specific elements: 'Returning volunteers login here' points to the Login button; 'New volunteers start here' points to the Create Account button; and 'Forgotten password' points to the 'CLICK HERE' link under 'Forgot Password?'. A 'More Help' section is also visible between the Instructor Tools and Quick Links columns.

**VITA/TCE Central**

Home

**Certification Tests**

Login Name:  
Login Name  
Password:  
Password

▶ Login to your IRS account:  
**Login**

▶ Set up a new IRS account:  
**Create Account**

▶ Forgot Password?  
[CLICK HERE](#)

▶ Need Password assistance?  
Contact us by [clicking here](#).

**Instructor Tools**

Classroom Presentations  
Lesson Plans  
Instructor Guide 4555e

**Quick Links**

Link & Learn Taxes Lessons  
Certification Test/Retest PDFs  
VITA/TCE Training Guide PDFs  
Evaluations  
Practice Lab  
VSOC Training  
Intake/Interview and Quality Review Training

**Returning volunteers login here**

**New volunteers start here**

**Forgotten password**

**More Help**

The TaxSlayer Practice Lab is now available and can be accessed by using the following link: <https://vita.taxslayerpro.com/IRSTraining>.  
The Practice Lab provides a simulated VITA/TCE learning environment in the TaxSlayer Pro Online software and is complete with learning tools and TaxSlayer support.

NOTE: Please use the generic password "TRAINPROWEB" to gain access to the lab.

If you had an account last year, you should 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 have forgotten your Login Name or changed the e-mail address on record, follow the instructions for new volunteers.

New volunteers 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

Welcome Geoffrey! | Sign out



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)

\* Username:

Password: [Change Password](#)

\* 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:

Daytime Telephone Number:

\* Time Zone:

Partner/Organization Name:

\* Years You Have Volunteered:

Professional status for Continuing Education credits or Circ 230 ONLY:

PTIN Number:

[PTIN Validation Information](#)

Name as listed on PTIN Card:

CTEC Number:

[CTEC Validation Information](#)

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

Select 02 – TCE – AARP Volunteer

Select **NO** – To Site Coordinator

Select Pub 4491 – Training Source

Complete remaining fields with your information.

Leave SEID field blank

Select AARP Tax-Aide in the Partner Name field

Complete Status and PTIN/CTEC fields if you are seeking CE credits

Returning Counselors update your Years of Service and any other information that may have changed.

Click on the **Advanced Tab**

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)
<a href="#">Volunteer Standards of Conduct Exam</a>			0
<a href="#">Intake/Interview and Quality Review Exam</a>			0
<a href="#">Advanced Exam</a>			0
<a href="#">Health Savings Accounts (HSA) 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.

From this screen you may:

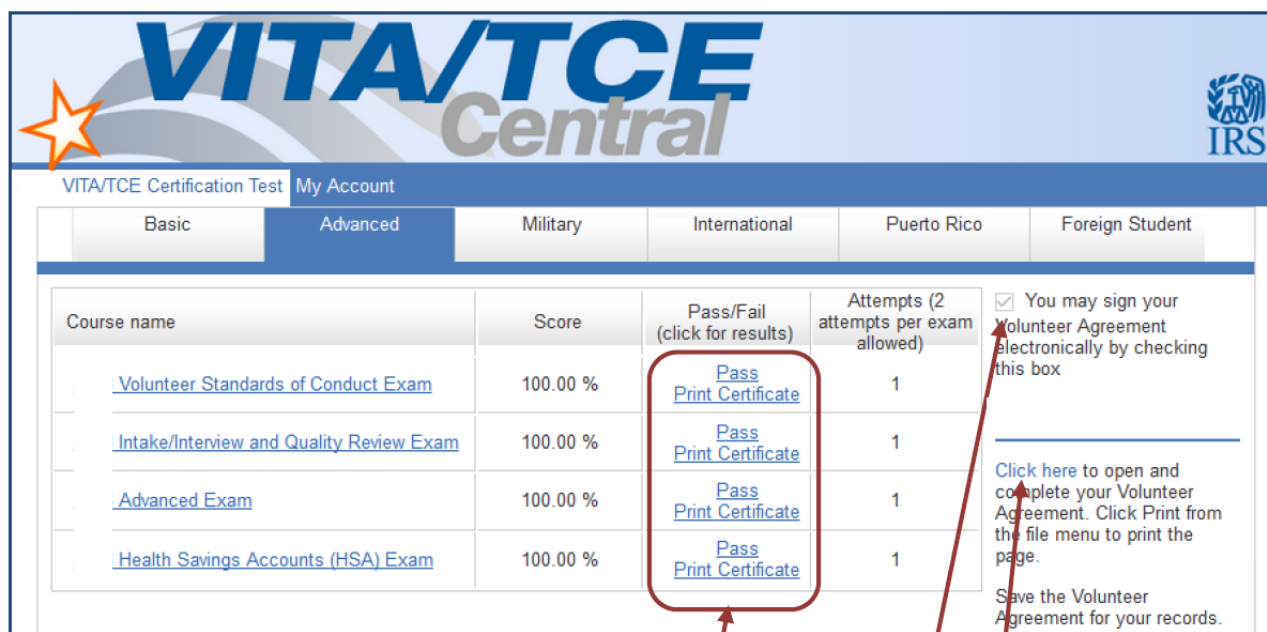
- Review the Volunteer Standards of Conduct course
- Review the Intake/Interview & Quality Review course
- Take the Volunteer Standards of Conduct exam
- Take the Intake/Interview and Quality Review exam
- Take the Advanced exam

The exams must be taken in order. You do not have to complete an exam in one session. You may close the exam at any point and log out. When you log back in Link & Learn will remember where you left off.

If you do not pass any exam with an 80% or higher score, you will need to take and pass the re-test for that level of exam. It is recommended you consult with your Instructor before taking the re-test as failure will disqualify you from your assignment at Tax Aide.

Once you have completed all the required exams successfully for your assignment, you can view, print, and save your Volunteer Agreement. This Agreement is proof of your Certification for the tax year of the exam.

You will need to send an electronic copy (attachment) of your Volunteer Agreement to either your instructor or direct supervisor. You will receive instructions as to whom requires the certificate.



**VITA/TCE Central**

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 checked="" type="checkbox"/> You may sign your Volunteer Agreement electronically by checking this box
<a href="#">Volunteer Standards of Conduct Exam</a>	100.00 %	<a href="#">Pass</a> <a href="#">Print Certificate</a>	1	<a href="#">Click here</a> to open and complete your Volunteer Agreement. Click Print from the file menu to print the page.  Save the Volunteer Agreement for your records.
<a href="#">Intake/Interview and Quality Review Exam</a>	100.00 %	<a href="#">Pass</a> <a href="#">Print Certificate</a>	1	
<a href="#">Advanced Exam</a>	100.00 %	<a href="#">Pass</a> <a href="#">Print Certificate</a>	1	
<a href="#">Health Savings Accounts (HSA) Exam</a>	100.00 %	<a href="#">Pass</a> <a href="#">Print Certificate</a>	1	

- **Do NOT use the “Print Certificate” links**
- Check the “You may sign...” box (your electronic signature)
- Click this link to create 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")

<b>Volunteer:</b> By signing this form, I declare that I have completed Volunteer Standards of Conduct Certification and have read, understand, and will comply with the volunteer standards of conduct. I also certify that I am a U.S. citizen, a legal resident, or otherwise reside in the U.S. legally.										
Full name (please print)						Volunteer position(s) <b>02 - TCE - AARP Volunteer</b>				
Home address (street, city, state and ZIP code)										
Email address				Daytime telephone			Sponsoring partner name/site name			
Number of years volunteered (including this year)				Volunteer signature <i>Electronic Signature</i>					Date	
<b>Volunteer Certification Levels (Add the letter "P" for all passing test scores)</b>										
Standards of Conduct (Required for ALL)	Intake/Interview & Quality Review	Basic	Advanced	Federal Tax Law Update Test for Circular 230 Professionals*	Military	International	HSA	Puerto Rico		Foreign Students
								1	2	
P	P		P				P			
<small>*Federal Tax Law Update Test for Circular 230 Professionals: Only volunteers in good standing as an attorney, CPA, or Enrolled Agent can take this certification. To qualify for this certification, the license information below must be completed by the volunteer and verified by the partner or site coordinator. Volunteers with this certification level can prepare any tax returns that fall within the scope of the VITA/TCE Programs. (Advanced, HSA, Military, etc.) A Scope of Service Chart is located in Publication 4012, VITA/TCE Volunteer Resource Guide. See Publication 1084, Site Coordinator Handbook, for additional requirements and instructions. Note: Advanced Certification is necessary for qualification for CE Credits, the Federal Tax Law Update Test does not qualify the volunteer to receive CE Credits. See Publication 4396-A, Partner Resource Guide, for more information about requirements for CE Credits.</small>										
Professional designation (Attorney, CPA, or Enrolled Agent)			Licensing jurisdiction (state)		Bar, license, registration, or enrollment number			Effective or issue date		Expiration date (if provided)
<small>Note: SPEC established the minimum certification requirements for volunteers who are authorized under Circular 230; however, partners may establish additional certification requirements for their volunteers. Volunteers should check with the sponsoring SPEC Partner.</small>										
<small>Site Coordinator, Sponsoring Partner, Instructor or IRS: By signing this form, I declare that I have verified the required certification level(s) and photo identification for this volunteer prior to allowing the volunteer to work at the VITA/TCE site.</small>										
Approving Official's (printed) name and title (site coordinator, sponsoring partner, instructor, etc.)						Approving Official's signature and date				

**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.

