Link & Learn Taxes

Certification Tests: Getting Started

VITA/TCE Central

The Link & Learn Taxes certification has been redesigned this year. 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 Intake/Interview and Quality Review Training, the Practice Lab, and the evaluations.

How to Register

To become certified for the VITA/TCE Programs, you must first self-register in the VITA/TCE Central testing system:

• 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 (*), all others are optional.

- Group: Select the appropriate volunteer group from the choices in the drop-down menu. Depending on which volunteer group you represent, some tests, such as Foreign Student and Site Coordinator, will only be available to those who have registered in those groups.

Select the appropriate volunteer group.

Problems with the website?

If you are experiencing problems accessing the Certification Test website:

- Try using the link http://www. linklearncertification.com/
- Try adding 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

- Continue to fill in the registration form with your first and last name, address, email address, and other information. You will choose a login name and password to use every time you return to VITA/TCE Central.

- Passwords are case sensitive.

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

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

Login to Certification

Once you create your login and password, you can login to the Home page. Remember your password is case sensitive.

Volunteer Standards of Conduct Training and Test

To participate in the VITA/TCE program, you must pass the IRS 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 links to the VSOC course and exam.

All volunteers must pass the VSOC test.

- In the first column, under the heading "Course name," click on the link for **Volunteer Standards of Conduct (VSOC)**. This opens a course description. Within this window, click **Launch** on the upper right to open the training. A new window opens the VSOC course.

- Review the entire lesson by clicking **NEXT** near the top of each screen. You must reach the last screen to receive credit for reviewing the VSOC course. Click the **X** at the top right corner to close the lesson.

Click this X to close the lesson.

- You'll see that VITA/TCE Central has scored the VSOC course as Complete. You may print a certificate of completion if you desire by clicking **Print Certificate**.

- Now you must pass the VSOC Exam with a score of 80% or greater. Click the link: **Volunteer Standards of Conduct (VSOC) – Exam**. Then click **Launch** in the upper right corner of the description window.

- 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.

- If you fail the exam, you may review the VSOC lesson and take the exam again. The exam questions may be different.

- When you pass the exam, click **Print Certificate** in the Pass/Fail column for a certificate of completion.
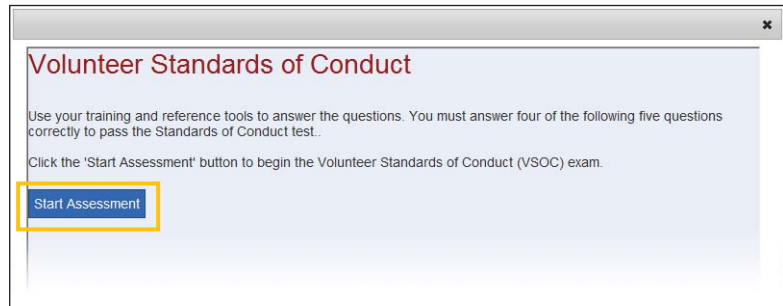
Note: The Volunteer Standards of Conduct course and test is a prerequisite to all other courses. If you do not pass this exam after the second attempt, you may not proceed to any other exams.

Signing Your Form 13615, Volunteer Agreement

After completing and passing your VSOC training and test, you must 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.

Click the box to electronically sign Form 13615.

Click the links to print your certificates.

- Open your **Form 13615** as a PDF by clicking **Click here to open and complete your Volunteer Agreement**. Your scores for any and all completed exams are entered automatically on page 2 of the form. 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 Standards of Conduct—A Public Trust.

Intake/Interview and Quality Review Training

New this year for all volunteers preparing tax returns is a requirement to complete the Intake/Interview and Quality Review Training course. This is a PowerPoint course designed to provide detailed training on how to use the intake sheet to prepare and quality review tax returns. You may take this training only after completing the VSOC training and exam. Click on the link for Intake/Interview and Quality Review Training to launch the course. Click through each screen to complete the course.

Taking VITA/TCE Certification Tests

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 any or all of the other certifications: Cancellation of Debt (COD), Military, and International. You are allowed two attempts to take each exam.

> ⚠️ **CAUTION**
> The test scenarios on VITA/TCE Central are the same as in the printed test booklet (Form 6744, Test/Retest). However, each question on the online test can be from either the Test or the Retest. You must read each question carefully before entering your answers.

To take an exam:

- Click on the **tab** for the certification path you want to achieve. 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 the VSOC Exam and completing the Intake/Interview and Quality Review Training course.

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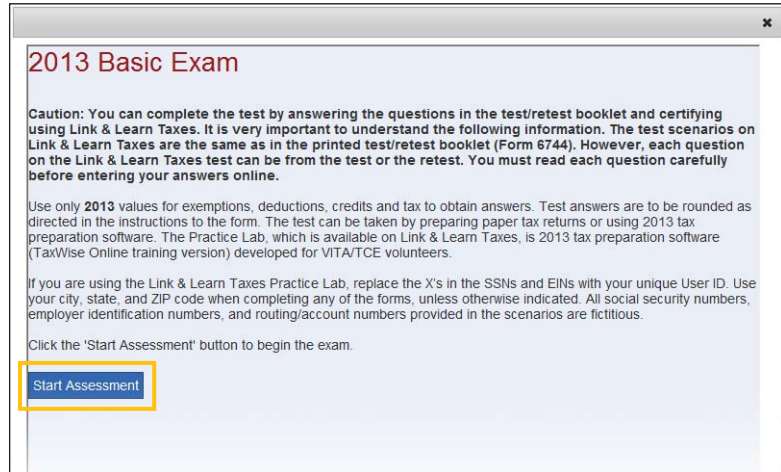
- To navigate within a certification test, use the simple controls available on each test screen.

  – **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.

TIP
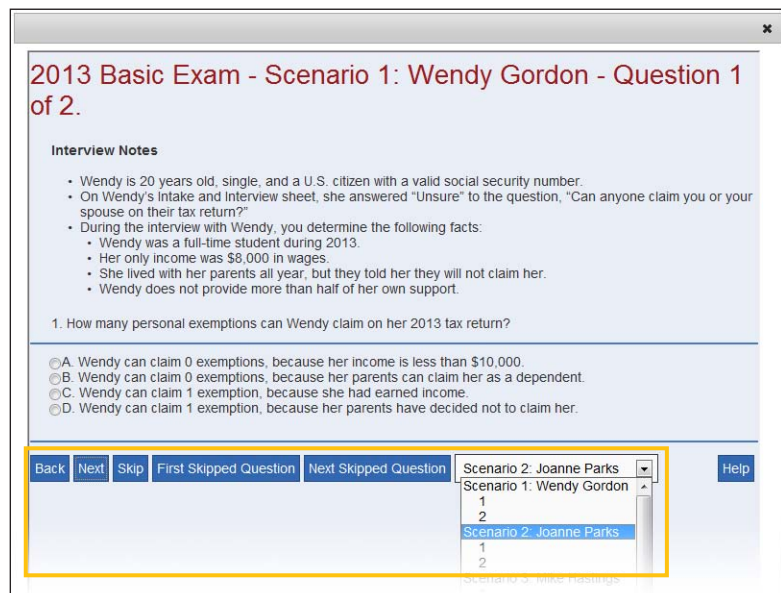
For fill-in-the-blank questions:

- Do not enter dollar signs, commas, periods, or decimal points. For example, enter "nineteen thousand dollars" as: 19000

- Enter negative numbers using the minus sign on your keyboard.

- Round decimals up or down to the nearest whole number.

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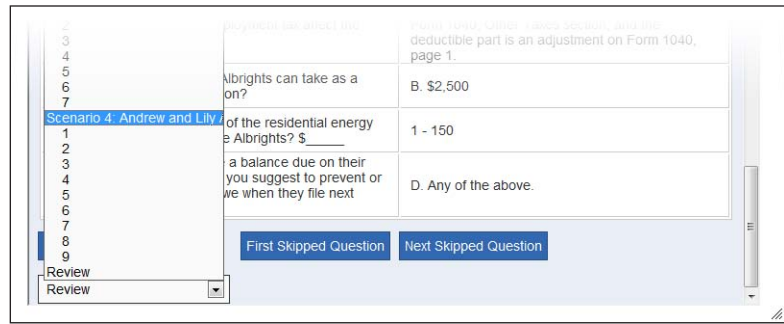
- When you are satisfied with your answers, click the **Submit** button in the Review screen at the bottom of the page to score your test.

- 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.
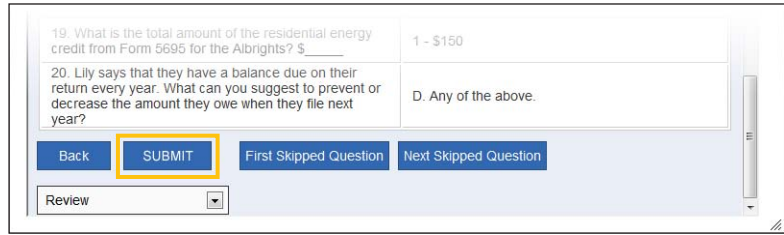
> **TIP**
>
> **For iPad or tablet users:**
> If the certification test window does not have a scroll bar and you cannot submit your test, close the window. Then, click the "In progress" link in the Pass/Fail column for that particular test. This reopens the test in a new window. Navigate to the final Review screen where you can click Submit.
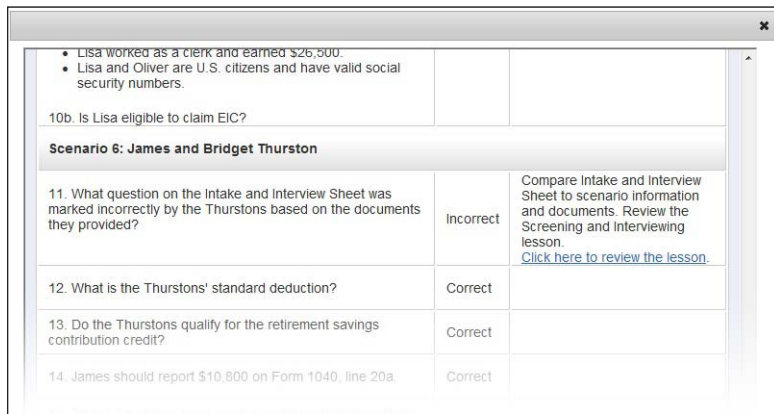
- Close the assessment window by clicking on the X in the upper right corner. VITA/TCE Central updates immediately to show you your score and whether you passed or failed the exam. A passing score allows you to print a certificate for that exam. Your online Form 13615 is also updated automatically.

- If you do not pass the test the first time, you may review the course material and try again.

Puerto Rico Tests

- All volunteers are required to complete the Volunteer Standards of Conduct (VSOC) training course and test, and must complete the Intake/Interview and Quality Review Training course.

- 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.

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

Foreign Student Tests

- All volunteers are required to complete the Volunteer Standards of Conduct (VSOC) training course and test, and must complete the Intake/Interview and Quality Review Training course.

- Only volunteers registered for the Foreign Student certification can access the Foreign Student Exam. If you did not select Foreign Student group when you registered, you can change your group by clicking My Account.

- Click the **Foreign Student** tab to access the test.

Site Coordinator Course

- All volunteers, including Site Coordinators, are required to complete the Volunteer Standards of Conduct (VSOC) training course and test, and must complete the Intake/Interview and Quality Review Training course.

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

References

For Quick Links to 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 IRS Publications and Forms.

Click here for Adobe Reader.