



# 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.

**VITA/TCE Central**

Home

**Certification Tests**

Login Name:

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](#).

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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.

Site Coordinators must create an account and register as Site Coordinator in the Site Coordinator field in order to take the Site Coordinator training. Foreign Student and Scholar volunteers no longer need to create an account and register as Foreign Student in the Group field in order to take the Foreign Student and Scholar test.

**Important:** You must turn off pop-up blockers to view the training.

If you have not completed an evaluation for the VITA/TCE training program click Evaluation under Quick Links.

**RSS Feed**  
[IRS News Releases](#)

**YouTube**  
[IRS Videos](#)  
[IRS Videos in American Sign](#)

**Facebook**  
[Internal Revenue Service Tax Professionals](#)

**Multimedia**  
[IRS Multimedia Center](#)

**Twitter**  
[IRS News](#)  
[Tax Professionals](#)

Access the latest training and testing materials using Quick Links.

## 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 (\*), all others are optional.
- Group: Select the appropriate volunteer group from the choices in the drop-down menu.

2016 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 - SPEC Employee
- ☐ 06 - Field Assistance (FA) Employee
- ☒ 07 - Foreign Student Site Volunteer
- ☐ 08 - IRS Employee - VITA/TCE
- ☐ 09 - Federal Employee non-IRS
- ☐ 10 - Other

\* Do you want to take the Site Coordinator course? ☒ Yes ☐ No

\* Training Source:

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.
- 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. Note that the Test site does not allow two users to have the same Login Name. You’ll need a unique Login Name that is not currently in the system.
- Passwords are case sensitive.
- Should you ever forget your password, a valid email address is required in order to send you a new password.
- Optional: Professional Status. Volunteers who are authorized under Circular 230 to practice before the IRS may take the Federal Tax Law Update Test for Circular 230 Professionals. These volunteers must register with professional designation of Attorney, Certified Financial Planner, CPA, or Enrolled Agent. Volunteers who complete this certification level can prepare any tax returns that fall within the scope of service of the VITA/TCE Programs.
- 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. 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.

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

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

- Email
- Years Volunteered, group
- Site Coordinator status
- Professional status

**New in 2017:**

- Daytime Telephone
- Partner/Organization Name
- Name listed on PTIN
- CTEC ID Number



**Problems with the Certification Test website?**

- Try using the link <https://www.linklearncertification.com/d/>
- Try adding <https://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)
- Sorry – technical support by telephone is not available.

## Login to Certification

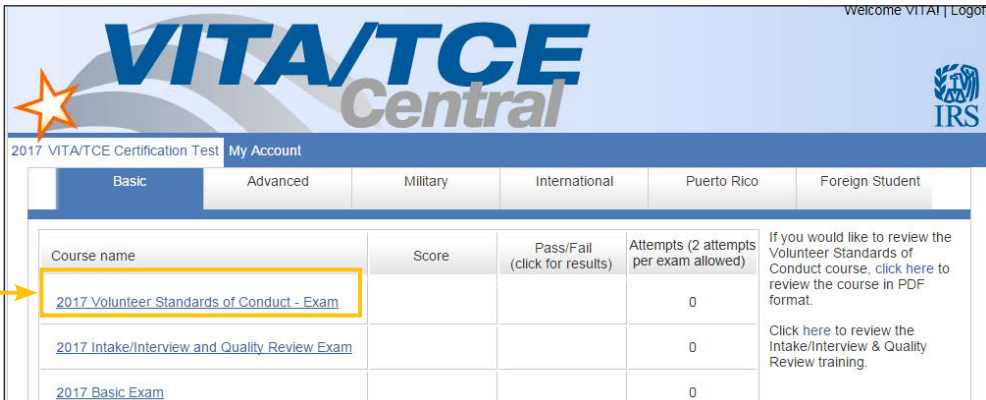
Once you create your Login Name and password, you can login to the Home page. Your password is case sensitive. Remember, Practice Lab not associated with the certification test site, and your Practice Lab user name and password will **not** provide access to the tests.

## 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.



| 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="#">2017 Volunteer Standards of Conduct - Exam</a>    |       |                               | 0                                      | Click here to review the Intake/Interview & Quality Review training.  |
| <a href="#">2017 Intake/Interview and Quality Review Exam</a> |       |                               | 0                                      |   |
| <a href="#">2017 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.
- 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.

**2017 Volunteer Standards of Conduct - Exam** [Launch](#)

**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.

2017 Volunteer Standards of Conduct - Exam [Exit Course](#)

### 2017 Volunteer Standards of Conduct Exam

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.

Click the 'Start Assessment' button to begin the Volunteer Standards of Conduct (VSOC) exam.

[Start Assessment](#)

- 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 also 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.

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.

2017 VITA/TCE Certification Test My Account

| 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.<br>Click here to review the Intake/Interview & Quality Review training. |
|---|-------|-------------------------------|--|---|
| <a href="#">2017 Volunteer Standards of Conduct - Exam</a>    |       |                               | 0                                      |   |
| <a href="#">2017 Intake/Interview and Quality Review Exam</a> |       |                               | 0                                      |   |
| <a href="#">2017 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.

2017 VITA/TCE Certification Test My Account

| 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 |
|---|----------|---|--|--|
| <a href="#">2017 Volunteer Standards of Conduct - Exam</a>    | 100.00 % | Pass<br><a href="#">Print Certificate</a> | 1                                      |  |
| <a href="#">2017 Intake/Interview and Quality Review Exam</a> | 100.00 % | Pass<br><a href="#">Print Certificate</a> | 1                                      |  |
| <a href="#">2017 Basic Exam</a>                               |          |   | 0                                      |  |

Click the box to electronically sign Form 13615.

Click the link to print your certificate.



- 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 telephone, 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

Welcome VITA | Log out

**VITA/TCE Central**

2017 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<br><a href="#">Click here to open and</a> |                 |
| <a href="#">2017 Volunteer Standards of Conduct - Exam</a>    | 100.00 % | <a href="#">Pass</a><br><a href="#">Print Certificate</a> | 1                                      |  |                 |
| <a href="#">2017 Intake/Interview and Quality Review Exam</a> | 100.00 % | <a href="#">Pass</a><br><a href="#">Print Certificate</a> |  |  |                 |
| <a href="#">2017 Advanced Exam</a>                            |          |   |  |  |                 |

be found in Publication 4299, Privacy, Confidentiality, and Civil Rights – A Public Trust.

**2017 Advanced Exam**

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.

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.)

**Launch**

## 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 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: Military and International. You are allowed two attempts to take each exam.

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 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

2017 Advanced Exam

**2017 Advanced Exam**

**Caution:** You can complete the test by answering the questions in the test/retest booklet and certifying using Link & Learn Taxes. It is very important to understand the following information. The test scenarios on Link & Learn Taxes are the same as in the printed test/retest booklet (Form 6744). Read each question carefully before entering your answers online.

Use only **2017** values for exemptions, deductions, credits and tax to obtain answers. Test answers are to be rounded as directed in the instructions to the form. The test can be taken by preparing paper tax returns or using 2017 tax preparation software. The Practice Lab, which is available on Link & Learn Taxes, is 2017 tax preparation software (TaxSlayer Online training version) developed for VITA/TCE volunteers.

If you are using the Link & Learn Taxes Practice Lab, replace the X's in the SSNs and EINs with your unique User ID. Use your city, state, and ZIP code when completing any of the forms, unless otherwise indicated. All social security numbers, employer identification numbers, and routing/account numbers provided in the scenarios are fictitious.

Click the 'Start Assessment' button to begin the exam.

**Start Assessment**

2017 Advanced Exam

**2017 Advanced Exam - Scenario 3: Henry and Claudia Oberlin - Question 2 of 2.**

**Interview Notes**

- Henry and Claudia are married and want to file a joint return.
- They have one child, Alyssa, who is 5 years old and lived with them all year.
- Henry, Claudia, and Alyssa lived in the U.S. all year and all have Individual Taxpayer Identification Numbers (ITINs).
- Henry earned \$37,000 in wages. Claudia had \$5,000 in wage income. They had no other income.
- Henry and Claudia provided all the support for Alyssa.

7. Henry and Claudia can claim Alyssa for which tax benefit(s)?

☐ A. Dependency exemption and the child tax credit

☐ B. Dependency exemption only

☐ C. Child tax credit only

☐ D. Neither dependency exemption nor child tax credit

**Question Drop-down Menu:**

- Scenario 1: Darcy and Chris Tabor
  - 1
  - 2
- Scenario 2: Mike Hastings
  - 1
  - 2
  - 3
- Scenario 3: Henry and Claudia Oberlin
  - 1
  - 2**
- Scenario 4: Martin Huron
  - 1
  - 2

**Back** **Next** **Skip** **First Skipped Question** **Next Skipped Question** **Help**

- 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.



#### 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.

| Question   | Answer               |
|--|----------------------|
| 19. What is the total amount of the residential energy credit from Form 5695 for the Albrights? \$_____  | 1 - \$150            |
| 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? | D. Any of the above. |

Buttons: Back, **Submit**, First Skipped Question, Next Skipped Question



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

| Question  | Result    | Feedback   |
|---|-----------|--|
| 10b. Is Lisa eligible to claim EIC?   |           |  |
| <b>Scenario 6: James and Bridget Thurston</b>   |           |  |
| 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   |  |



## Federal Tax Law Update Test for Circular 230 Professionals

- If you are a volunteer who is authorized under Circular 230 to practice before the IRS, you may take the optional Federal Tax Law Update Test for Circular 230 Professionals. 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.
- 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.
- 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%.

| 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="#">2017 Volunteer Standards of Conduct - Exam</a>                      | 100.00 % | <a href="#">Pass</a><br><a href="#">Print Certificate</a> | 1                                      | <a href="#">Click here to open and complete your Volunteer Agreement. Click Print from the file menu to print the page</a> |
| <a href="#">2017 Intake/Interview and Quality Review Exam</a>                   | 100.00 % | <a href="#">Pass</a><br><a href="#">Print Certificate</a> | 1                                      |  |
| <a href="#">2017 Federal Tax Law Update Test for Circular 230 Professionals</a> | 100.00 % | <a href="#">Pass</a><br><a href="#">Print Certificate</a> | 2                                      |  |

## 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.

## 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 [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)

