FACT SHEET

2015 Filing Season: Link & Learn Taxes Certification Reports

November 2014

This document provides Territory Managers and designated HQ and Area Analysts information on the volunteer certification reports that are available on Link & Learn Taxes

Background

Link & Learn Taxes provide online courses and certification tests for all individuals interested in volunteering in the Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs.

Link & Learn Certification Reports

These reports provide certification information on volunteers and employees who have completed their certification via Link & Learn Taxes. The Volunteer Lists can be used to provide partner specific information to sites for validation of certifications. However, the listing must be sanitized to show only the volunteer names that are located at a particular site. Since the lists contain Personally Identifiable Information (PII), you must use secure messaging when you email this within the IRS or to Partners. You can also share with Partners by phone, fax, or postal mail.

Who Has Access to the Reports?

For the 2015 Filing Season, territory managers and designated HQ and Area analysts will have access to the reports in Link & Learn Taxes. The following is a list of the contacts for each Area and HQ:

Location	Contact
Area 1	Elizabeth (Betsy) Solino Cynthia Smith
Area 2	Terence (Terry) Donahue Tim (Timothy) Mohrhaus
Area 3	April Crawford Gladys Nichols
Headquarters	Ben Epps Kathy Brown

How to Access the Reports

1. If you had report access last year and use your login from last year, you will still have report access. Please skip steps 2 through 4.

2. If you have not already done so, the first step is to complete the self-registration on the Link & Learn Taxes test server (login page). You can use your login from last year or re-register by using the following link for direct access to the test server: https://www.linklearncertification.com/d/self_registration_irs/

3. Safeguard your login and password for future use. There is a *Forgot your Password* link on the login page which requires you to provide an email address. A password will then be sent to your email account within 15 minutes.

4. To request reports access: Send an email to the designated Area Analyst with your first and last **name used in your registration**, **SEID** and **confirm** that you have registered.

5. Once access is granted, after you log in you will see an **"Admin"** link next to the **"My Account"** link above the certification tabs. Click **Admin** and then click **Reports** link.

6. Be sure to turn off Pop-up blockers by clicking on the **Tools** menu.

7. On the left side menu, click **Volunteer List**.

8. On the **Volunteer List,** territory managers can now select the report and filter by **Area and then by Territory number.** You can also filter by Group or Exams. These reports are in excel so you can copy the report to your own excel spreadsheet for sorting. The columns for the course completion date will need to be converted to a date format in Excel. If the report is slow or you receive an error message, retry. If problems continue, contact your Area analyst.

9. The **Volunteer List** includes the following information of the individual certified: Territory, SEID (IRS employees only), Last Name, First Name, Address, City, Zip code, email, group, date signed, years of service, PTIN number, course completion, and test score. All courses and tests completions display in this report.

10. There may be overlap between Areas since the reports are sorted by the **zip codes** from the test taker's registration information on Link & Learn Taxes. There may be instances where you may have to research more than one Territory/Area's list.

11. Registrations that have International address codes are (AS, FM, GU, MH, MP, PW, and VI) are on the Reports Menu as **Volunteer List for International**. The Military address codes (AA, AE, AP) are on the Reports Menu as **Volunteer List for Military**. Areas that have volunteers with any of these address codes may want to review both of these certification lists.

12. The certification report includes Personally Identifiable Information (PII) so you must use secure messaging when you email the information or the report to other IRS employees and partners.

13. You can provide the information to Partners by phone, fax, secure email or postal mail. You can email this data to Partners using secure messaging. Please obtain the Partners' consent prior to emailing.

14. Generally, the certification results are updated on the reports once daily. The report includes the **latest** level of certification.

15. Additional reports are available on the Reports Menu, such as the Executive Summary and the Missed Questions Report.

16. To access the Executive summary, click Admin, Reports and scroll to the bottom of the page and click IRS Executive Summary.