

Frequently Asked Questions – 2020 Link & Learn Taxes Volunteer Certification Test for SPEC Partners and Employees

This publication provides information about the volunteer courses and certification tests on Link & Learn Taxes.

Background

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

Questions and Answers

1. Q: How do I access the online test?

A: You can either log in directly at <https://www.linklearncertification.com/> or you can select VITA/TCE Central from the **Link & Learn Taxes** page.

If you have an existing account, enter your username and password. If not, create a new account. Once you are logged in, select your preferred certification level from the tabs along the top of the screen. You must first complete the Volunteer Standards of Conduct exam and the Intake/Interview and Quality Review exam. When you are ready to complete any subsequent exams, click on the exam link and select “Launch” from the upper right-hand corner of the pop-up box. If the word “Launch” does not appear, you have not yet completed a prerequisite for the exam you selected.

2. Q: What is the passing score for certification?

A: The passing score is 80% or higher.

3. Q: What if I do not pass a test on my first attempt?

A: If you are taking the paper test, Form 6744, there is a retest following each test which asks different questions for the same scenarios used in the test. The online test allows a total of 2 attempts at certification for each test. The questions for the test and retest will be in order.

4. Q: What if I am unable to complete an online test in one session?

A: The online system will bookmark where you stop in an online test. When you log back in, the system will show “In progress” for the test you were taking. Just click on that link to continue with the test.

5. Q: What if I need to change an answer on the online test?

A: In the online test, you can use the “Back” button to change your answer to a question. At the end of the test, there will be a message displaying your answers and any questions that have not been answered. You will need to complete all questions and then hit the “Submit” key. The “Help” link provides tips to avoid input errors. Once you hit the “Submit” key, you will not be able to change your answers.

6. Q: Are there any helpful hints for taking the online test?

A: When entering a fill-in answer, use only numbers; do not use symbols such as dollar signs, commas or decimal points.

7. Q: What documentation can I obtain if I certify through the online test with Link & Learn Taxes?

A: Once you successfully complete a test, you can print a course certificate. You can also print or save a copy of the Form 13615, Volunteer Standards of Conduct Agreement. Volunteers can sign Form 13615 electronically.

8. Q: What if I forget my password for the online test?

A: At the bottom of the online test login screen, click the “Forgot Password” link and follow the directions. Be sure to enter your email address correctly during the registration process so you will receive e-mail notifications about your login name or password. If you are still not able to reset your password, you can contact the help desk at linklearnsupport@redcedarconsultancy.com.

9. Q: Can I use references to complete the test?

A: The test is an open book test. You can use forms, instructions and other reference material to take the test. You should complete the test on your own.

10. Q: What tax year does the test use for answers to the questions?

A: The answers are based on 2020 tax rates, adjustments and deductions. Tax year 2020 VITA/TCE training materials, tax forms, instructions and publications are available on www.irs.gov. Draft tax forms may be available to review if the 2020 versions have not been finalized.

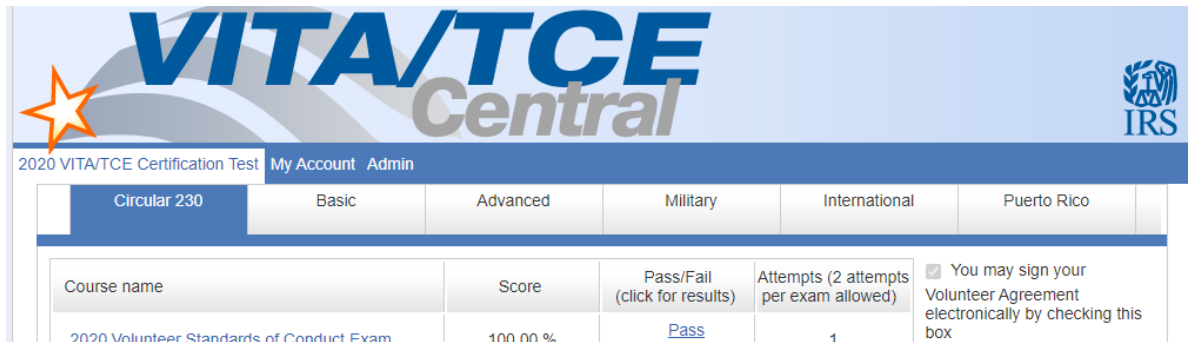
11. Q: Do I have to take the Basic course before taking any of the other courses?

A: Review course material in Publication 4491, VITA/TCE Training Guide. Then review the lessons online at Link & Learn Taxes by taking the interactive quizzes and skills workout exercises. The instructions for reviewing the lessons on Link & Learn Taxes and the instructions for certification on the online test site are different.

- Instructions for reviewing the lesson information online: On Link & Learn Taxes, each lesson is self-contained. The Basic tab includes just the Basic course. The Advanced tab includes all Basic and Advanced information. The optional courses contain the information for that subject. If you received training in a classroom setting, virtual learning session or by using the Publication 4491, you may proceed directly to the online test without reviewing the Link & Learn Taxes workout exercises.

- Instructions for certification online: For certification testing, you must first pass the Volunteer Standards of Conduct and the Intake/Interview and Quality Review tests. You can then choose either the Basic, Advanced, Qualified Experienced Volunteer (QEV) or Foreign Students and Scholars test. The QEV test is an optional path that allows returning volunteers to certify at the advanced level, but will be an abbreviated test. Partners or sites may determine, at a local or national level, if they will accept this test for certification. The link for the QEV test is on the Advanced tab. After completing the Advanced test, you may take the optional Military or International tests.
Note: You do not need to complete the Basic test before taking the Advanced, QEV, Circular 230 or Specialty test.
- The Health Savings Account (HSA) certification is no longer available for tax year 2020. HSA competencies are moved to the Advanced and QEV tests. You must pass at least one of these certifications in order to prepare returns that involve HSAs.
- VITA/TCE volunteers with the professional designation of attorney, certified public account or enrolled agent have the option to certify on new provisions and tax law changes by completing the Circular 230 Federal Tax Law Updates Test. These volunteers are first required to certify on the Volunteer Standards of Conduct test and the Intake/Interview & Quality Review test. The test is available on Link & Learn Taxes and is also printed in the Form 6744, VITA/TCE Volunteer Assistor’s Test/Retest. Once the required certifications are successfully completed, these eligible volunteers are authorized to prepare all tax returns within the scope of the VITA/TCE programs.

The Circular 230 Exam 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.



12. Q: Where is the Site Coordinator test?

A: A new certification test is required for site coordinators and alternate coordinators. To make the Site Coordinator test available, select “yes” next to Site Coordinator on the self-registration page. The certification will then be available to you.

13. Q: If I registered and created an account last year, do I have to register again this year?

A: No, you don’t have to register again. You can use the same login and password from last year. Volunteers should not have more than one account in the system.

14. Q: How can I update my information on the online test?

A: Log into the online test and click the “My Account” tab to make any updates. Update any

changes to your group, address, email, daytime telephone number and total number of years you have volunteered for the program. If you want to receive Continuing Education credits, make sure you select your professional status, PTIN, name and CTEC number if applicable. Click the “Save” button at the bottom of the page to save your changes. **Note:** This year every volunteer will be prompted to update their information the first time they log into the 2020 exams.

15. Q: Can I create another account if I can’t login into my current account?

A: No. If a volunteer registers more than once with the same email account, they will be notified that the system only allows one account per email address. If volunteers already have an account, the system will not allow a new account to be created with the same email address. If needed, volunteers can use the password reset function.

16. Q: How do I obtain the answer key to the certification tests?

A: Links for Publication 4189, VITA/TCE Test/Retest Answers, will be accessible electronically from the homepage, in the lower left corner, to volunteer instructors, site coordinators and SPEC territory managers after they achieve a passing score of 80% or higher and select the applicable role. Volunteers instructors, site coordinators and SPEC territory managers must update their profile and select the applicable role on the “My Account” tab for the 4189 links to generate.

17. Q: How do I get continuing education credits?

A: Refer to the instructions in [Publication 5362](#), Fact Sheet for VITA/TCE Partners and Volunteers: Continuing Education Credits.