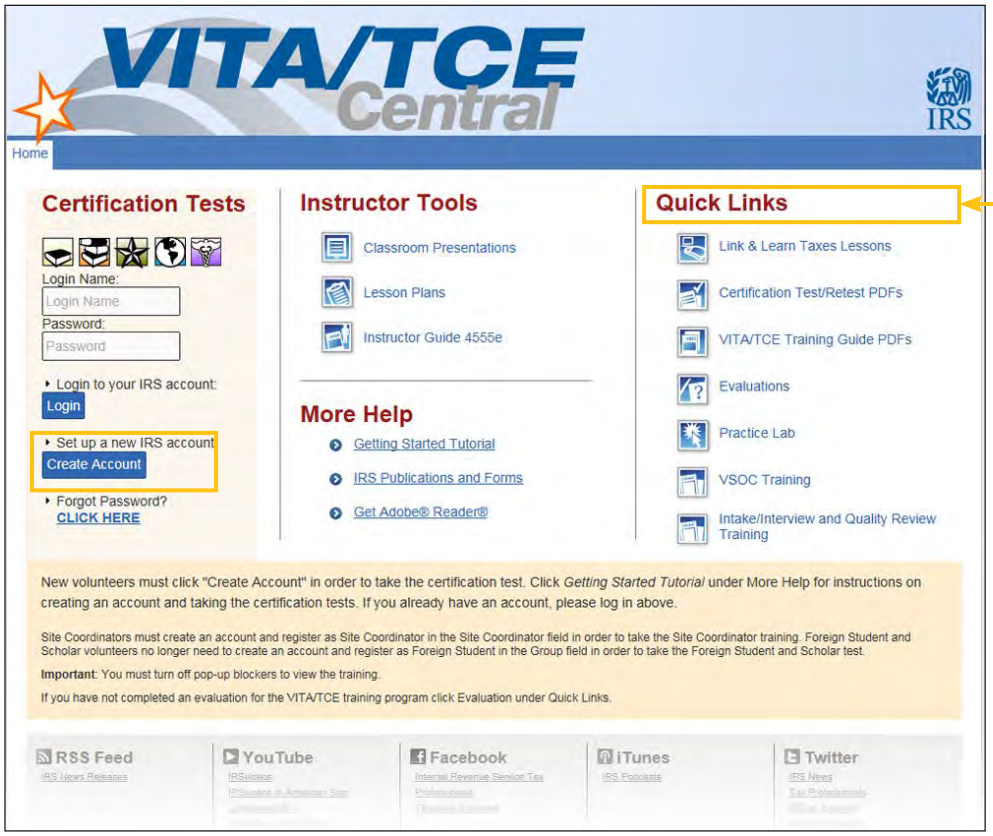
Link & Learn Taxes

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 training course, Intake/Interview and Quality Review Training, the Practice Lab, and the evaluations.



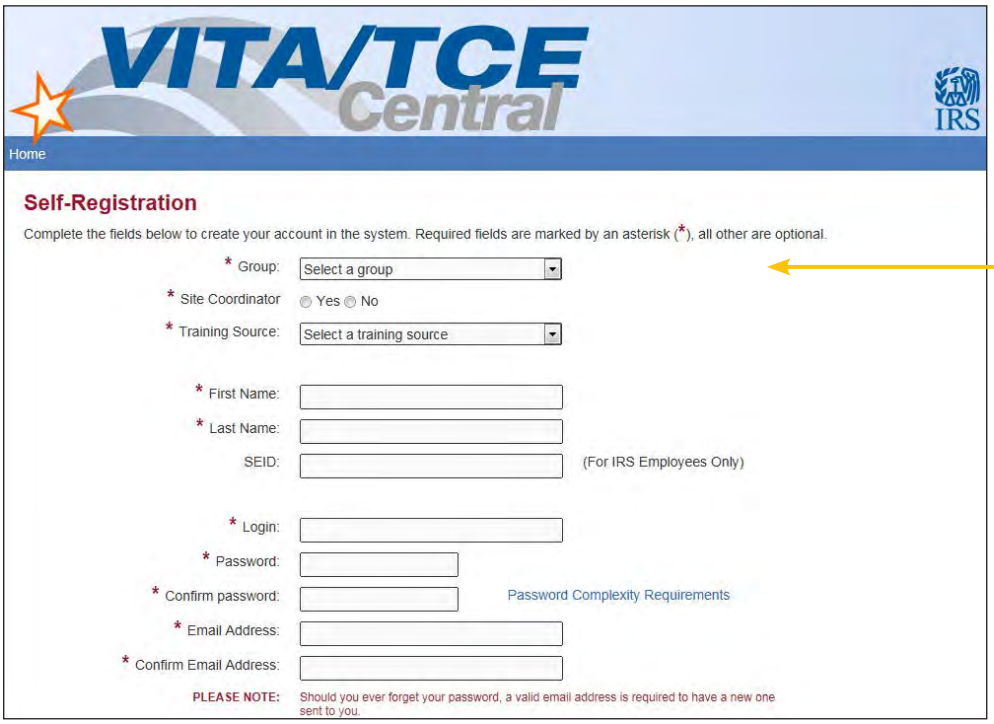
Access the latest training and testing materials using Quick Links.

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. If you are also a Site Coordinator, please check the Site Coordinator check box to have access to the Site Coordinator training course.



- 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.
- Optional: If you receive Continuing Education (CE) Credits for taking the Certification Tests, select your CE Credit role from the drop-down menu on the registration form. The selected role will appear on the Form 13615 Volunteer Agreement after you complete any tests.
- 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, 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
- Continuing education credit

TIP

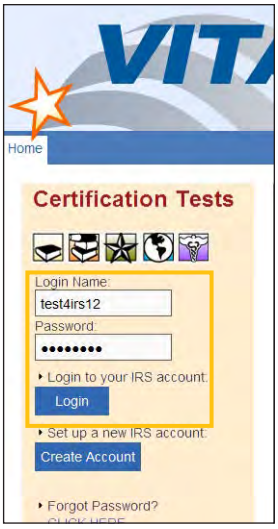
Problems with the website?

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

Login to Certification

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



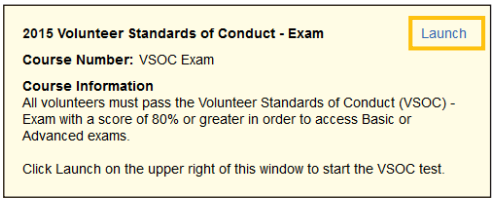
Volunteer Standards of Conduct Training and Test

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:

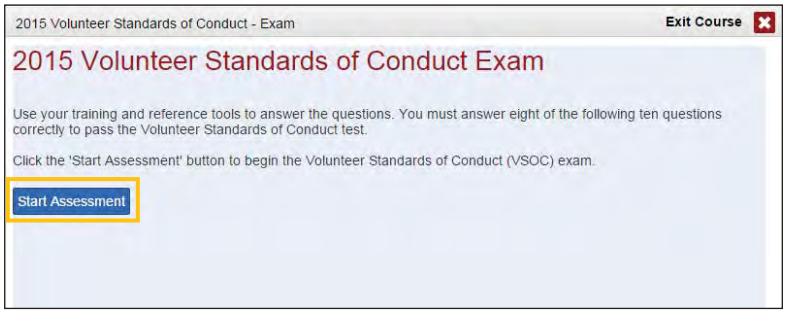
- Click on a tab for your course of training, such as Basic, Advanced, Military, or International. All tabs include a link to the VSOC exam.

All volunteers must pass the VSOC test.

- 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. The exam questions may be different.
- When you pass the exam, click **Print Certificate** in the Pass/Fail column for a certificate of completion.

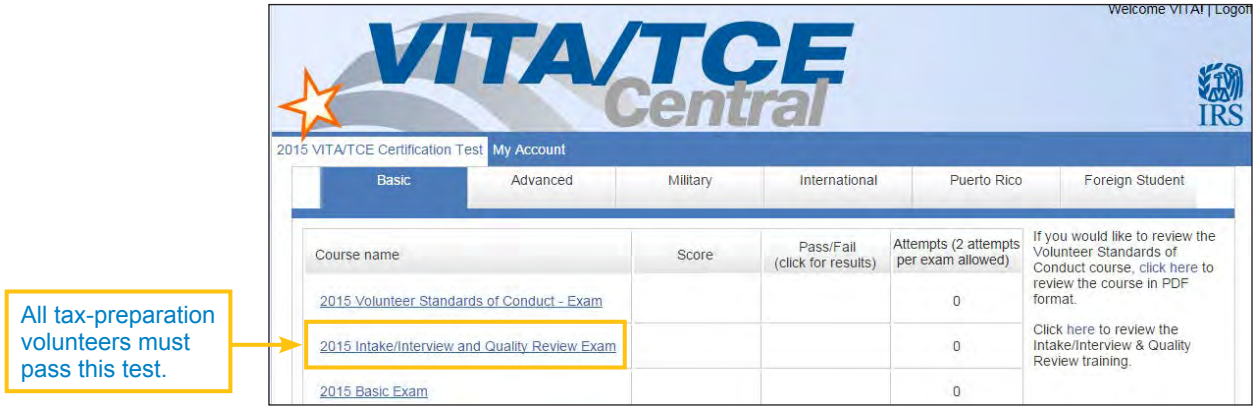
Note: The Volunteer Standards of Conduct Exam is a prerequisite to all other courses. If you do not pass this exam after the second attempt, you may not proceed to any other exams.

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. The exam questions may be different.

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.



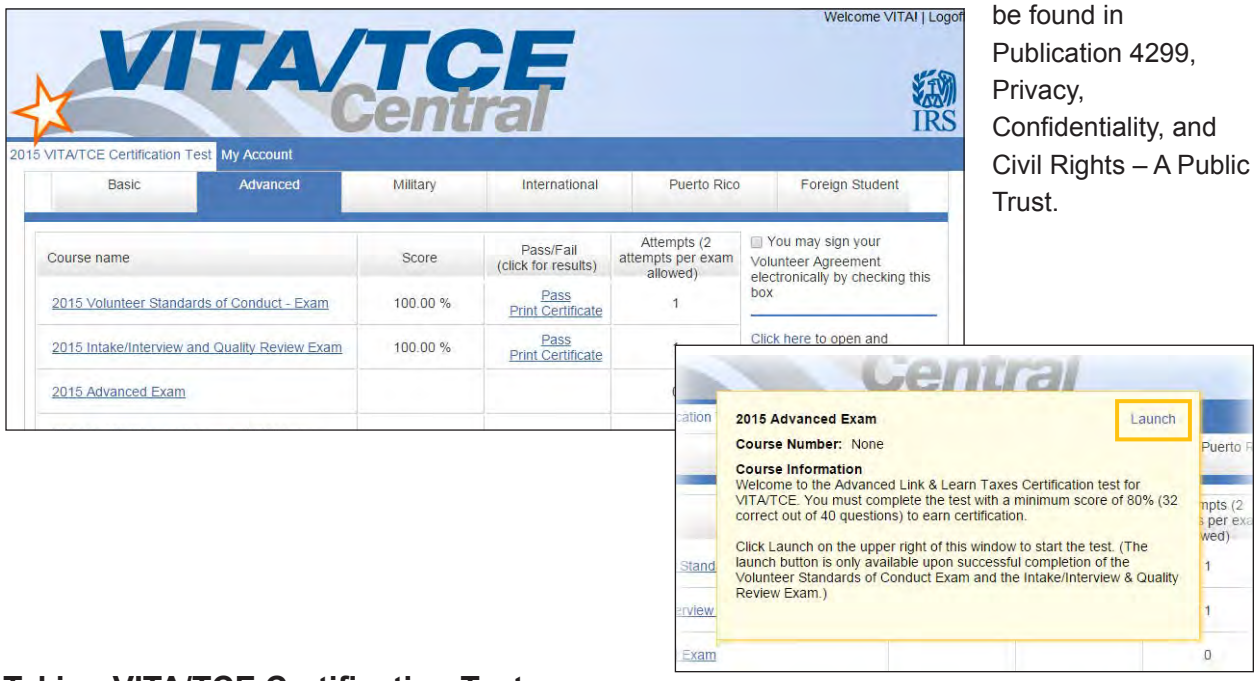
Signing Your Form 13615, Volunteer Agreement

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.

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



Taking VITA/TCE Certification Tests

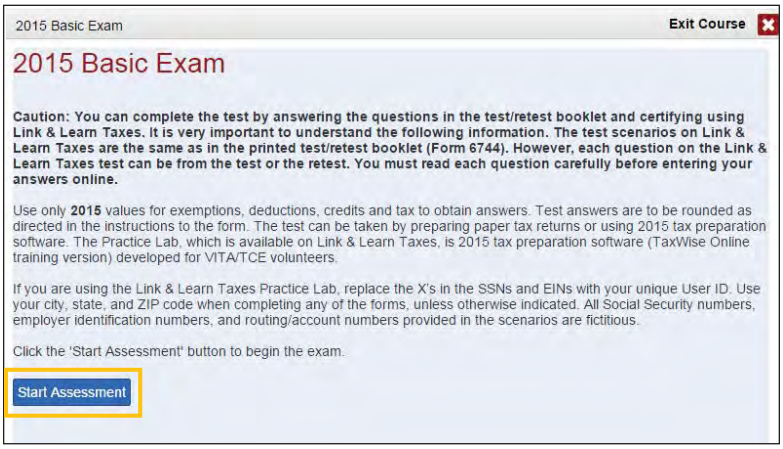
Volunteers preparing tax returns must pass either the Basic or Advanced certification test. Note that Basic and Advanced are standalone certifications; it is not required to take the Basic exam if you wish to certify in Advanced. A minimum score of 80% is required to pass each certification test. After 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: Military and International. You are allowed two attempts to take each exam.

To take an exam:

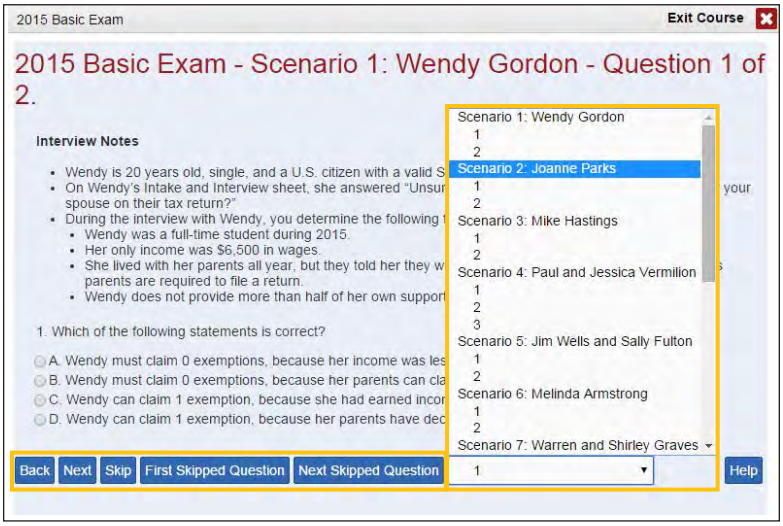
- Click on the **tab** for the certification path you want to achieve. All the exams available for each certification path will be listed under the corresponding tabs.

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.

- 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



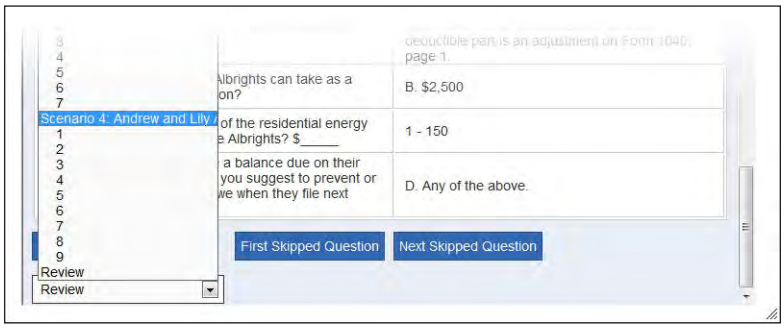
- You cannot use **Next** or **Back** without answering the question on the screen. If you want to skip the question temporarily and move to the next question, click the **Skip** button. If you want to return to the Scenario description, click on the Scenario listed on the **Question Drop-down Menu**.
- 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.

TIP

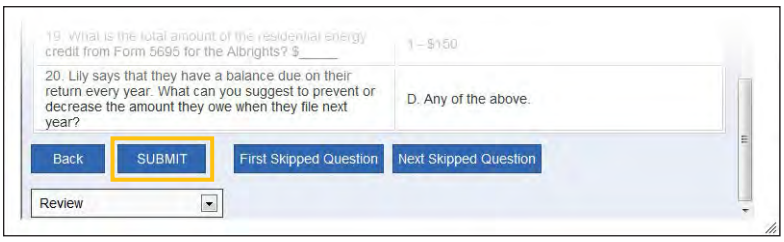
For fill-in-the-blank questions:

- 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.

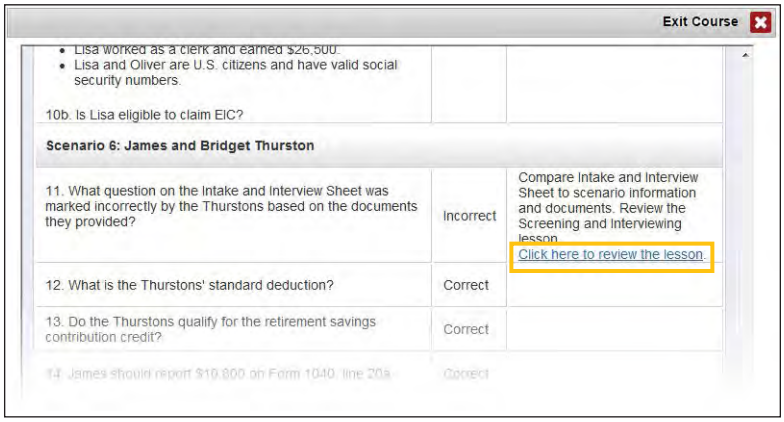
This Review screen summarizes all the questions and your selected answers and alerts you if you have any unanswered questions. You may return to any question to change your answer if desired before you submit your test for scoring; simply click on the desired question from the **Question Drop-down Menu** 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.



- 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.

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.

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

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

Site Coordinator Course

- 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 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. 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

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