

FACT SHEET

2017 Link & Learn Taxes – Frequently Asked Questions Volunteer Certification Test



November 2017

This document provides information about the volunteer courses and certification tests via Link & Learn Taxes.

Background

Link & Learn Taxes provides 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.

Q1: How do I access the online test?

A1: You can either log in directly at <https://www.linklearncertification.com/> or from the Link & Learn Taxes page, <http://apps.irs.gov/app/vita/>, select **VITA/TCE Central**.

If you have an existing account enter your user name 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 and Intake/Interview and Quality Review exams. 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.

Q2: What is the passing score for certification?

A2: The passing score is 80% or higher.

Q3: What if I do not pass a test on my first attempt?

A3: 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.

Q4: What if I am unable to complete an online test in one session?

A4: 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.

Q5: What if I need to change an answer on the online test?

A5: 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.

Q6: Are there any helpful hints for taking the online test?

A6: When entering a fill-in answer use only numbers; do not use symbols such as dollar signs, commas, or decimal points.

Q7: What documentation can I obtain if I certify through the online test with Link & Learn Taxes?

A7: Once you successfully complete a test you can print a course certificate and print or save a copy of the Form 13615, *Volunteer Standards of Conduct Agreement*. Volunteers can sign Form 13615 electronically.

Q8: What if I forget my password for the online test?

A8: 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 or password. If you are still not able to reset your password, you can contact the help desk at linklearnsupport@epsilonsystems.com.

Q9: Can I use references to complete the test?

A9: 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.

Q10: What tax year does the test use for answers to the questions?

A10: The answers are based on **2017** tax rates, deductions, and exemptions. Tax year 2017 VITA/TCE training materials, tax forms, instructions and publications are available on www.irs.gov.

Q11: Do I have to take the Basic course before taking any of the other courses?

A11: The instructions for taking the **courses** on Link & Learn Taxes and the instructions for **certification** on the online test site are different.

Instructions for taking the **courses** online:

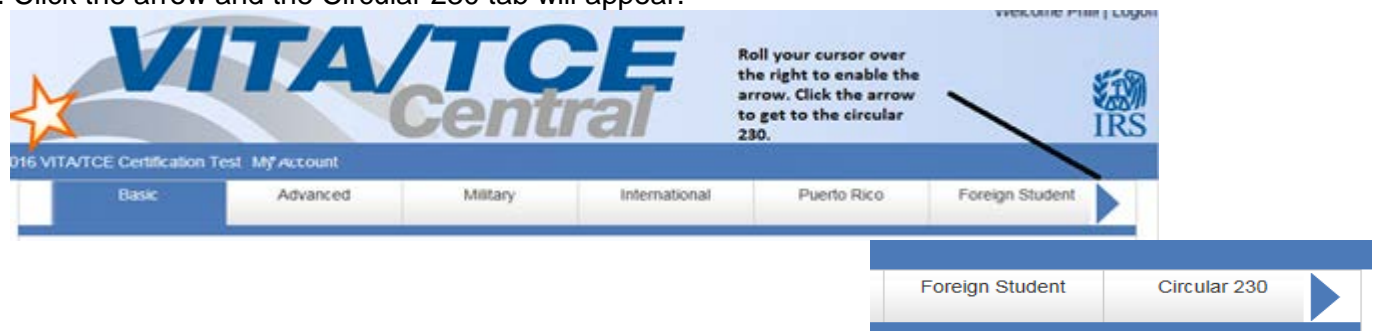
On Link & Learn Taxes, each course is self-contained. The Basic tab includes just the Basic course. The Advanced tab includes all Basic and Advanced information. The optional courses contain the information for that subject. If you are an experienced volunteer you can choose to review the returning volunteer course rather than the entire Basic or Advanced course. If you received training in a classroom setting or using the Publication 4491 you may proceed directly to the online test without reviewing the Link & Learn Taxes course.

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 or the Advanced test or the Foreign Students and Scholars test. After completing the Basic or Advanced test you may take the optional Health Savings Accounts or the Puerto Rico test. With Advanced certification, you also have the option of taking the Military or International tests. **Note:** You **do not** have to complete Basic before taking Advanced.

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 *Federal Tax law update Test for Circular 230 Professionals*. These volunteers are first required to certify to the Volunteer Standards of Conduct and Intake/Interview & Quality Review tests. 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 can be found by rolling your cursor over the area to the right of the Foreign Student tab. Click the arrow and the Circular 230 tab will appear.



Q12: Where is the Site Coordinator training?

A12: To make the Site Coordinator training available, select “yes” next to Site Coordinator on the self-registration page. The training will then be available to you.

Q13: If I registered and created an account last year do I have to register again this year?

A13: No, you don't have to register again. You can use the same login and password from last year.

Q14: How can I update my information on the online test?

A14: Login to 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 2017 exams.*