

Taking the Tests Online – TY2018

Mandatory for Tax-Aide Counselors

- Volunteer Standards of Conduct Exam
- Intake/Interview and Quality Review Exam
- Advanced Exam

Mandatory for Client Facilitators

- Volunteer Standards of Conduct Exam
- Intake/Interview and Quality Review Exam

The *Volunteer Standards of Conduct Exam* is required for all volunteers. The *Intake/Interview and*

Quality Review Exam is also required of Client Facilitators. The *Advanced Exam* is required for all volunteers who will be working with taxpayer data.

Optional

A fourth test, *Health Savings Accounts (HSA) Exam* is optional, but as many as possible should certify. HSA is in scope with certification but requires two HSA-certified counselors to do a return; one to prepare the return and a second for Quality Review.

Training for the *Volunteer Standards of Conduct Exam* is available in IRS Publication 4961, which is available only electronically. It can be downloaded via the Volunteer Standards of Conduct course link on the VITA/TCE Central page or from the IRS web site at www.irs.gov.

Training for the *Intake/Interview and Quality Review Exam* is in IRS Publication 5101. This publication can be downloaded from the sites as mentioned above. Even if you think you can pass the exam without studying, this is very useful information that should not be ignored.

Online training for both the *Advanced Exam* is available through the IRS Link & Learn web site at <https://apps.irs.gov/app/vita/>. Click on the link “[Click here to see the content of each course](#)”.

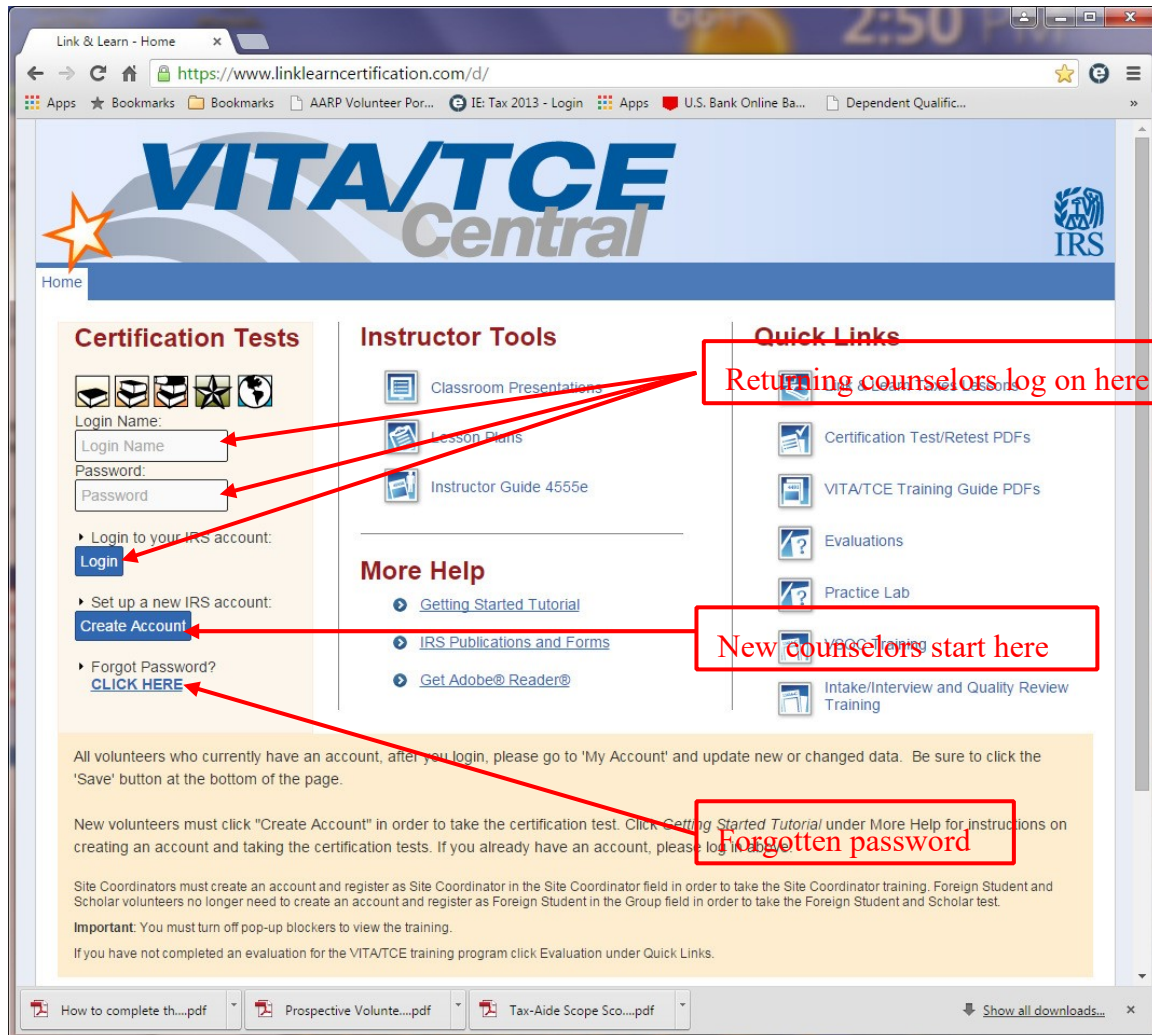
You should go to only the “Advanced Menu” topics.

You will receive a printed copy of IRS Publication 4491, the *VITA/TCE Training Guide* IRS this year that has been updated for TY 2018. The printed copy of IRS publication 4012, the *VITA/TCE Volunteer Resource Guide* will not be available until mid to late January. IRS Publication 4942 (training material for HSA), is not available as a printed document. Electronic versions of all these documents are available at www.irs.gov, and you will always find the most up to date version there.

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When you are ready to start your tests, the URL for the test site is:

<https://www.linklearncertification.com/>




If you had an account last year, you can login using your old Login Name and Password. If you cannot remember your password, click “[CLICK HERE](#)” just below “Forgot Password”. A new password will be sent to the e-mail address that is on record.

If you’ve forgotten your Login Name or changed the e-mail address on record, follow the instructions for new counselors.

New counselors will have to create an account the first time they visit the site. Click on “Create Account” which will take you to the screen image on the next page. Follow the instructions below carefully; failing to do so could get you “off in the weeds.”

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Create a new account

VITA/TCE Central 

Home

Self-Registration

Complete the fields below to create your account in the system. Required fields are marked by an asterisk (*), all other are optional.

* Group:

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

* Training Source:

* First Name:

* Last Name:

SEID: (For IRS Employees Only)

* Login:

* Password:

* Confirm password: Password Complexity Requirements

* Email Address:

* Confirm Email Address:

PLEASE NOTE: Should you ever forget your password, a valid email address is required to have a new one sent to you.

* Address 1:

Address 2:

* City:

* State / Province:

* Postal Code:

* Time Zone:

* Years You Have Volunteered:

Professional Status:

PTIN Number: PTIN Validation Information

PLEASE NOTE: Enter your PTIN as it appears on your PTIN card; however, do not include a hyphen.

1. For “Group”, select “2- TCE – AARP Volunteer”
2. Check “No” for “Site Coordinator” **even if you are an LC.**
3. For Training Source, select “Publication 4491”.
4. Complete the remaining fields with your information.
5. All fields with a ‘*’ must be completed.

Leave the “SEID” field blank, it is for IRS employees only.

Complete the Professional Status and PTIN Number fields only if you will be seeking continuing education credits.

Make sure that you record your Login (user name) and Password.

When you have completed all fields, click REGISTER.

You can now log in using your new Login and Password. This is the entry page.

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For returning counselors, go to “My Account” and update the years of service and any other information that may have changed.

Link & Learn - My Account

https://www.linklearncertification.com/d/edit_registration_irs/

2015 VITA/TCE Certification Test My Account

My account details

Required fields are marked by an asterisk (*), all other are optional.

* Group: 08 - IRS Employee - VITA/TCE

* Site Coordinator: Yes No

* Training Source: Link and Learn Taxes (e-learning)

* First Name: Robert

* Last Name: Francis

SEID: (For IRS Employees Only)

* Login: rfranc

Password: [Change Password](#)

* Email Address: rfranc@comcast.net

* Confirm Email Address: rfranc@comcast.net

PLEASE NOTE: Should you ever forget your password, a valid email address is required to have a new one sent to you.

* Address 1: 4916 Friar Ave

Address 2:

* City: Fremont

* State / Province: California

* Postal Code: 94555

* Time Zone: (GMT-08:00) Pacific Time (US & Can)

* Years You Have Volunteered: 7

Continuing Education (CE) Credit: [Select a CE Credit Role](#)

PTIN Number: PTIN Validation Information

PLEASE NOTE: Enter your PTIN as it appears on your PTIN card; however, do not include a hyphen.

[Save](#)

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How to complete th....pdf Prospective Volunte....pdf Tax-Aide Scope Sco....pdf Show all downloads...

Click “Save” when finished editing. This will return you to the Home page.

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Click on the “Advanced” tab. The “Basic” tab is for VITA only.

The screenshot shows the VITA/TCE Central website interface. At the top, there is a navigation bar with the VITA/TCE Central logo and the IRS logo. Below the navigation bar, there is a section for '2016 VITA/TCE Certification Test' with a 'My Account' link. The 'Advanced' tab is selected, and a red arrow points to it. A red box highlights the text 'Advanced Tab' with an arrow pointing to the 'Advanced' tab. Below the tabs, there is a table with columns for 'Course name', 'Score', 'Pass/Fail (click for results)', and 'Attempts (2 attempts per exam allowed)'. The table lists four courses: '2016 Volunteer Standards of Conduct - Exam', '2016 Intake/Interview and Quality Review Exam', '2016 Basic Exam', and '2016 Health Savings Accounts (HSA) Exam'. All 'Attempts' are 0. To the right of the table, there is a text box with instructions on how to review the course in PDF format and a link to review the Intake/Interview & Quality Review training. The footer of the page contains the copyright notice '©2002-2016 KMI All Rights Reserved'.

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)
2016 Volunteer Standards of Conduct - Exam			0
2016 Intake/Interview and Quality Review Exam			0
2016 Basic Exam			0
2016 Health Savings Accounts (HSA) Exam			0

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Advanced tab options

2015 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)
2015 Volunteer Standards of Conduct - Exam			0
2015 Intake/Interview and Quality Review Exam			0
2015 Advanced Exam			0
2015 Health Savings Accounts (HSA) Exam			0

If you would like to review the Volunteer Standards of Conduct course, [click here](#) to review the course in PDF format.

[Click here](#) to review the Intake/Interview & Quality Review training.

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How to complete th...pdf Prospective Volunte...pdf Tax-Aide Scope Sco...pdf show all downloads...

From here you can

- ❖ Review the “Volunteer Standards of Conduct” training
- ❖ Review the “Intake/Interview and Quality Review” training
- ❖ Take the “Volunteer Standards of Conduct” exam
- ❖ Take the “Intake/Interview and Quality Review” exam
- ❖ Take the “Advanced” exam
- ❖ (Optionally) Take the “Health Savings Accounts (HSA)” exam

The tests must be taken and passed in this order

- Volunteer Standards of Conduct
- Intake/Interview and Quality Review
- Advanced
- Health Savings Accounts (HSA) (Optional, and can be postponed until later)

You do not have to complete a test in one sitting. You can close the test at any point, log off and then log back on at a later time. The software will remember your progress in the test.

If you do not pass a particular level, you must take and pass the Retest for that level.

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When you have completed and passed all exams, you can view your Volunteer Agreement and then both print and save it.

Once you have completed the tests, send an electronic copy of your Volunteer Agreement only (not any Certificates) as instructed by your District leadership.

The screenshot shows the VITA/TCE Central website interface. The user is logged in as Robert Francis. The page displays a table of exam results for the 2015 VITA/TCE Certification Test. The table has columns for Course name, Score, Pass/Fail (click for results), and Attempts (2 attempts per exam allowed). All four exams listed (2015 Volunteer Standards of Conduct - Exam, 2015 Intake/Interview and Quality Review Exam, 2015 Advanced Exam, and 2015 Health Savings Accounts (HSA) Exam) show a score of 100% and a 'Pass' status. Each row includes a 'Print Certificate' link. To the right of the table, there is a section titled 'You may sign your Volunteer Agreement electronically by checking this box' with a checked checkbox and the name 'Robert Francis 11/11/2015'. Below this, there are instructions on how to open and complete the agreement, save it, and review the course materials. Red arrows point from the 'Print Certificate' links in the table to the 'Do NOT use the "Print Certificate" links' instruction below. Another red arrow points from the 'You may sign...' checkbox to the 'Check the "You may sign..." box' instruction below.

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)
2015 Volunteer Standards of Conduct - Exam	100%	Pass Print Certificate	1
2015 Intake/Interview and Quality Review Exam	100%	Pass Print Certificate	1
2015 Advanced Exam	100%	Pass Print Certificate	1
2015 Health Savings Accounts (HSA) Exam	100%	Pass Print Certificate	1

Do NOT use the “Print Certificate” links

Check the “You may sign...” box (your electronic signature)

Click this link

Clicking the link creates a file named “agreement.pdf”. It contains an electronic copy of your Volunteer Agreement, IRS Form 13615. Save this file on your computer. Page 2 of the form has your electronic signature as well as the results of your tests.

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Volunteer Agreement, page 2 - (Link & Learn document “agreement.pdf”)

Page 2

Volunteer:
By signing this form, I declare that I have completed Volunteer Standards of Conduct Certification and have read, understand, and will comply with the volunteer standards of conduct.

Full name (please print) _____ Volunteer position(s) IRS Employee - VITA/TCE Volunteer TCE - AARP Volunteer

Home street address: civ. state and ZIP code _____

Email address _____ Daytime telephone _____ Sponsor's e-mail address (if any) _____

Number of years volunteered (including this year) 7 Volunteer signature Robert Francis Date 11/11/2015

Volunteer Certification Levels

	Standards of Conduct (Required for ALL)	Intake/ Interview & Quality Review	Basic	Advanced	Military	International	HSA	Puerto Rico 1	Puerto Rico 2	Foreign Students
Add the letter "P" for all passing test scores	P	P		P			P			

Site Coordinator, Sponsoring Partner, Instructor or IRS: By signing this form, I declare that I have verified the required certification level(s) and proper identification for this volunteer prior to allowing the volunteer to work at the VITA/TCE site.

Approving Official's (printed) name and title (site coordinator, sponsoring partner, instructor, etc.) _____ Approving Official's signature and date _____

For Continuing Education (CE) Credits ONLY
(to be completed by the site coordinator or partner)

Instructions: Complete this section when an unpaid certified volunteer is requesting Continuing Education (CE) credits. CE credits will not be issued without a PTIN for Enrolled Agents or Non-credentialed preparers, CPAs or other similar professions do not require a PTIN; however, they must check with their governing board requirements for obtaining CE Credits. The Site Coordinator or Partner must sign and date the form and send the completed form to SPEC Territory Office/Relationship Manager for further processing. See Publication 1084, Site Coordinators Handbook, for additional requirements and instructions.

Name as listed on PTIN card _____ Volunteer Preparer's Tax Identification Number (PTIN) P _____

Address (VITA/TCE Site or teaching location) _____ Site Identification Number (SIDN) S - _____

Volunteer Status (check only one box)
 Enrolled Agent (EA) Non-credentialed Tax Return Preparer Certified Public Accountant (CPA) Other

Test Results

Volunteer Position (Check only one box in the appropriate section below)

Quality Reviewer Return Preparer
 Tax Law Instructor
(all must be certified in Advanced)

OR

Quality Reviewer Return Preparer
 Tax Law Instructor
(all must be certified in Advanced AND one or more specialty course)

Volunteer Hours (add the numbers of completed volunteer hours below)
 (minimum of 10 volunteer hours required to issue CE Credits)

Total hours volunteered _____
 (qualifies for 14 CE credits)

OR

Total hours volunteered _____
 (qualifies for 18 CE credits)

If applicable, check tax law courses instructed
 Basic Advanced Military International HSA Puerto Rico Foreign Students & Scholars

Site Coordinator, Sponsoring Partner, or Instructor: By signing this form, I declare that I have validated that the reported volunteer hours are based on the activities this volunteer performed in my site or training facility.

Approving Official's (printed) name and title (site coordinator, sponsoring partner, instructor) _____

Approving Official's signature _____ Date signed _____

Catalog Number 38847H www.irs.gov Form 13615 (Rev. 10-2015)

NOTE: The test results show only Pass/Fail. Your instructor will not see your actual test scores.

There is no need to print the Volunteer Agreement and it has already been signed electronically. Just send your instructor the electronic copy attached to an e-mail as instructed.