

Taking the Tests Online

Tax Year 2020

Counselors have three mandatory tests and other optional tests. Client Facilitators are required to pass the *Intake/Interview and Quality Review Exam* in addition to the *Standards of Conduct Exam*.

Mandatory for Tax-Aide Counselors

- Volunteer Standards of Conduct Exam
- Intake/Interview and Quality Review Exam
- Advanced Exam (Notes: the Qualified Experienced Volunteer and Circular 230 exams are not substitutes for the Advanced test and *Health Savings Accounts* is now included in the Advanced exam.)

Optional

Military, International and Foreign Students Exams are optional exams.

Online training for all exams 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 do not need to go to the “Basic Menu” topics. They are included in the “Advanced Menu” topics.**

Training Materials

All IRS forms and pubs can be downloaded from www.irs.gov. NTTC modifications to *Pubs 4012 and 4491* as well as the *NTTC Workbook* can be downloaded from the Tax-Aide Volunteer Portal or sent to you by your instructor (via e-mail, a flash drive, or sharing a Google Drive folder in Chromebook).

Training for Volunteer Standards of Conduct Exam	<i>IRS Pub 4961</i>	Electronic only
Training for Intake/Interview and Quality Review Exam	<i>IRS Pub 5101</i>	Electronic only
Training for Advanced, Military and International Exams	<i>IRS Pub 4491</i> . See also <i>NTTC Modified Pub 4491</i> (electronic only) or <i>NTTC Modifications to Pub 4491</i> (to read alongside the paper IRS version)	IRS documents available both electronically and a limited quantity of paper versions. NTTC documents are electronic only.
Reference Guide	<i>IRS Pub 4012</i> , See also <i>NTTC Modified Pub 4012</i> (electronic only)	IRS version is available in both electronic and paper; recommended NTTC version electronic only.
Exams	<i>IRS Pub 6744</i> , or at www.LinkLearnCertification.com (See following directions)	Both electronic and paper copies of test scenarios and questions. Recommended to take the test on line.

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

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

VITA/TCE Central

Home

Certification Tests

Login Name:

Password:

▶ Login to your IRS account:
[Login](#)

▶ Set up a new IRS account:
[Create Account](#)

▶ Forgot Password?
[CLICK HERE](#)

▶ Need Password assistance?
Contact us by [clicking here](#).

Instructor Tools

- [Classroom Presentations](#)
- [Lesson Plans](#)
- [Instructor Guide 4555e](#)

More Help

- [Getting Started Tutorial](#)
- [IRS Publications and Forms](#)
- [Get Adobe® Reader®](#)

Quick Links

- [Link & Learn Taxes Lessons](#)
- [Certification Test/Retest PDFs](#)
- [VITA/TCE Training Guide PDFs](#)
- [Evaluations](#)
- [Practice Lab](#)
- [VSOC Training](#)
- [Intake/Interview and Quality Review Training](#)

The TaxSlayer Practice Lab is now available and can be accessed by using the following link: <https://vita.taxslayerpro.com/IRSTraining>.
The Practice Lab provides a simulated VITA/TCE learning environment in the TaxSlayer Pro Online software and is complete with learning tools and TaxSlayer support.


NOTE: Please use the generic password "TRAINPROWEB" to gain access to the lab.

If you had an account last year, you should 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 volunteers.

New volunteers 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."

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: 01 - VITA Volunteer
 02 - TCE - AARP Volunteer ← Select "02- TCE – AARP Volunteer" for Group
 03 - TCE - Other Volunteer
 04 - VITA - Military Volunteer
 05 - IRS Employee - SPEC
 06 - IRS Employee - Other
 07 - Foreign Student Site Volunteer
 08 - IRS Employee - Volunteer
 09 - Federal Employee non-IRS employee
 10 - Other

Select "No" for "Site Coordinator" even if you are an LC. ←

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

* Are you an Instructor? Yes No

* Are you an IRS SPEC Territory Manager? Yes No

* Do you plan to volunteer in the VITA/TCE Program? Yes No

* Training Source: ← Select "Publication 4491" for Training Source

* First Name:

* Last Name:

SEID: (For

* 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:

Daytime Telephone Number:

- Complete the remaining fields with your information.
- Choose your own Login name and password.
- All fields with an "*" must be completed.
- Leave the "SEID" field blank. It is for IRS employees only.

Enter AARP Tax-Aide for Partner Name

Update "Years" and include upcoming tax season

Complete the Professional Status and PTIN and CTEC fields **ONLY** if you will be seeking continuing education credits.

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

Make sure that you record your Login (user name) and Password. When you have completed all fields, click REGISTER.

Register

For returning counselors, after you log in, go to "My Account", update the years of service and any other information that may have changed and click Save.

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

Welcome DUMMY! | Logoff

VITA/TCE Central

2018 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)
2018 Volunteer Standards of Conduct Exam			0
2018 Intake/Interview and Quality Review Exam			0
2018 Advanced 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.

Click Advanced

Advanced tab options



2018 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)	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.	
2018 Volunteer Standards of Conduct Exam			0		
2018 Intake/Interview and Quality Review Exam			0		
2018 Advanced Exam			0		

From here you can

- Review the “Volunteer Standards of Conduct” training
- Review the “Intake/Interview and Quality Review” training
- Take the 2020 Volunteer Standards of Conduct exam
- Take the 2020 Intake/Interview and Quality Review exam
- Take the 2020 Advanced exam

The exams must be taken and passed in this order

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

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

If you do not pass a particular level, you must take and pass the Retest for that level. We recommend you confer with your Instructor before taking a Retest as failing it again disqualifies you from that part of the program.

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

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

2018 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)
2018 Volunteer Standards of Conduct Exam	100.00 %	Pass Print Certificate	1
2018 Intake/Interview and Quality Review Exam	100.00 %	Pass Print Certificate	1
2018 Advanced Exam	100.00 %	Pass Print Certificate	1

You may sign your Volunteer Agreement electronically by checking this box.

[Click here to open and complete your Volunteer Agreement. Click Print from the file menu to print the page.](#)

Save the Volunteer Agreement for your records.

- **Do NOT use the “Print Certificate” links**
- Click on “Pass or “Fail” to see which questions you missed. If your instructors ask to have that page so they can see what the class needs to emphasize next year, use your browser print function (usually File>Print or Ctrl-P) to print it.
- Check the “You may sign...” box (your electronic signature)
- Click this link to create a file named “agreement.pdf”. It contains an electronic copy of your Volunteer Agreement, IRS Form 13615. Save this file on your computer and either print it or e-mail it to your instructor. Page 2 of the form has your electronic signature as well as the results of your tests.

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

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. I also certify that I am a U.S. citizen, a legal resident, or otherwise reside in the U.S. legally.

Full name (please print) **Tax-Aide Student** Volunteer position(s) **02 - TCE - AARP Volunteer**

Home address (street, city, state and ZIP code) **123 Main St., Your City, Your State, Your Zipcode**

Email address **Student@Gmail.com** Daytime telephone **(800) 555-1212** Sponsoring partner name/site name **AARP Tax-Aide**

Number of years volunteered (including this year) _____ Volunteer signature **Electronic Signature** Date _____

Volunteer Certification Levels (Add the letter "P" for all passing test scores)

Standards of Conduct (Required for ALL)	Intake/Interview & Quality Review	Basic	Advanced	Federal Tax Law Update Test for Circular 230 Professionals*	Military	International	HSA	Puerto Rico		Foreign Students
								1	2	
P	P		P				P			

*Federal Tax Law Update Test for Circular 230 Professionals: Only volunteers in good standing as an attorney, CPA, or Enrolled Agent can take this certification. To qualify for this certification, the license information below must be completed by the volunteer and verified by the partner or site coordinator. Volunteers with this certification level can prepare any tax returns that fall within the scope of the VITA/TCE Programs. (Advanced, HSA, Military, etc.) A Scope of Service Chart is located in Publication 4012, VITA/TCE Volunteer Resource Guide. See Publication 1084, Site Coordinator Handbook, for additional requirements and instructions. Note: Advanced Certification is necessary for qualification for CE Credits, the Federal Tax Law Update Test does not qualify the volunteer to receive CE Credits. See Publication 4396-A, Partner Resource Guide, for more information about requirements for CE Credits.

Professional designation (Attorney, CPA, or Enrolled Agent) _____ Licensing jurisdiction (state) _____ Bar, license, registration, or enrollment number _____ Effective or issue date _____ Expiration date (if provided) _____

Note: SPEC established the minimum certification requirements for volunteers who are authorized under Circular 230; however, partners may establish additional certification requirements for their volunteers. Volunteers should check with the sponsoring SPEC Partner.

Site Coordinator, Sponsoring Partner, Instructor or IRS: By signing this form, I declare that I have verified the required certification level(s) and photo 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 _____

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 or as instructed.