Taking the IRS Certification Tests Online Tax Year 2023

(Click here for the latest version of this document)

Mandatory Tests for Tax-Aide	Counselors	Client Facilitators	Local Coordinators Shift Coordinators		
VOLUNTEER STANDARDS OF CONDUCT	✓	✓	✓		
INTAKE/INTERVIEW AND QUALITY REVIEW EXAM	✓	✓	✓		
ADVANCED EXAM	✓		*		
SITE COORDINATOR EXAM			✓		

^{*} Required if also serving as a Counselor

Notes:

- The Circular 230 Exam may not be substituted for the Advanced Exam
- ATP Assisters, EROs, Instructors, Training Coordinators, Training Specialists, and Regional Training Advisors must also complete the Counselor tests
- Other tests are optional check with your Local Coordinator or Instructor to see if any are useful for your site

Training Materials

NTTC Self-Study: Certification Lessons can be used to prepare for the tests. These lessons make use of the IRS Link & Learn Taxes lessons at https://apps.irs.gov/app/vita/ and will be updated for tax year 2023 in early December when the Link & Learn lessons are updated.

Click the below links to access other training materials electronically. Your Instructor may provide printed copies of the *NTTC Workbook*, *IRS Form 6744*, and *IRS Pub 4012*.

- IRS Pub 4961 IRS Training for Volunteer Standards of Conduct
- IRS Pub 5101 IRS Training for Intake/Interview and Quality Review
- IRS Pub 5838 Intake/Interview and Quality Review Handbook (new)
- <u>Tax-Aide Version of Pub 4491</u> Training for Advanced, Military, and International
- NTTC Modified Pub 4012 Volunteer Resource Guide
- NTTC Workbook Practice Exercises and Quizzes (also see Workbook Errata)
- IRS Form 6744 Test/Retest Questions and Scenarios
- IRS Pub 5088 IRS Training for Site Coordinators
- IRS Pub 5683 Handbook for Partners and Site Coordinators
- IRS Pub 4756 IRS Training for Foreign Student and Scholar Tax Returns
- IRS Pub 4011 Foreign Student and Scholar Resource Guide
- IRS Pub 5883 SPEC Over-the-Phone Interpreter (OPI) Services Training (new)
- NTTC Training Resources Links including all Self-Study, Videos, etc.
- Other IRS publications, forms, and instructions at IRS.GOV

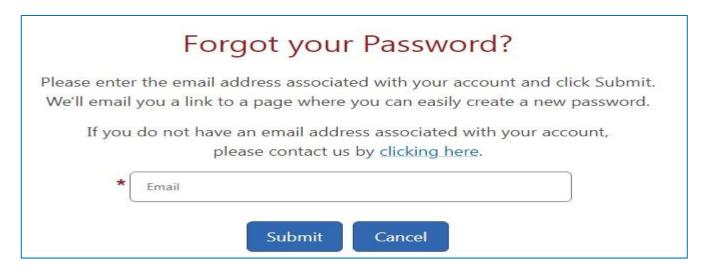
Sign in to Link & Learn

All volunteers (including Client Facilitators) must create an account and record their answers in Link & Learn. Instructors may assist with creating the account. There is a new site for tax year 2023. **Do not use the old test site.**

The URL for the *new* test site is: https://linklearntaxescertification.com/

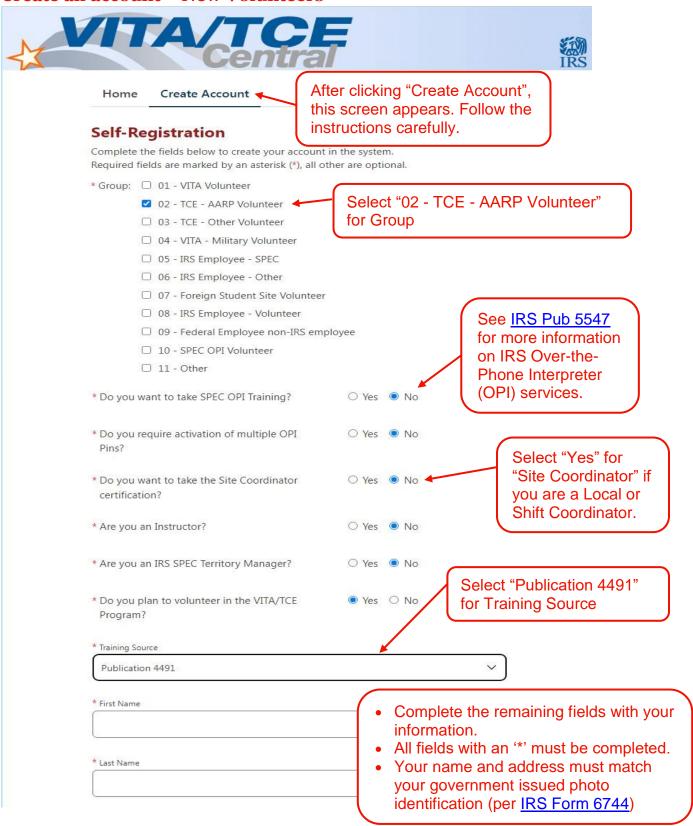


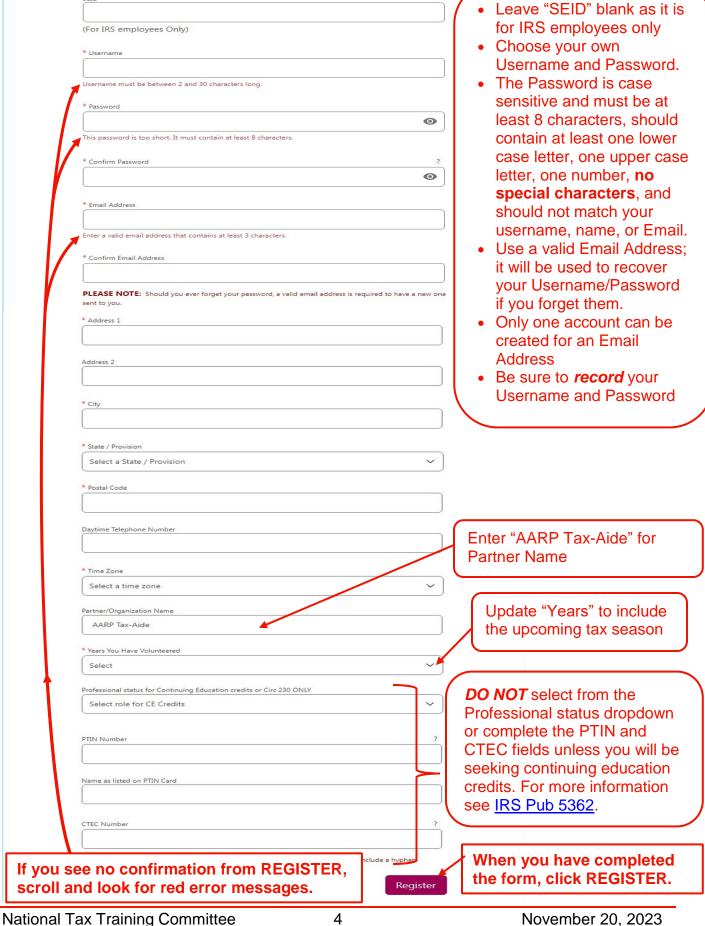
If you had an account last year, you will need to create a Password for the new site. Click "Forgot Password" and enter the email address associated with your account. Instructions will be sent to that email address. If you have not received an email after 15 minutes, please check your junk mail folder for email from linklearnsupport@redcedarconsultancy.com.



Do not use special characters in your new Password. Please verify your "My Account" information as **some values and selections were NOT** being carried over from the old account. If you cannot recover your Username or Password, follow the instructions for new volunteers.

Create an account - New Volunteers

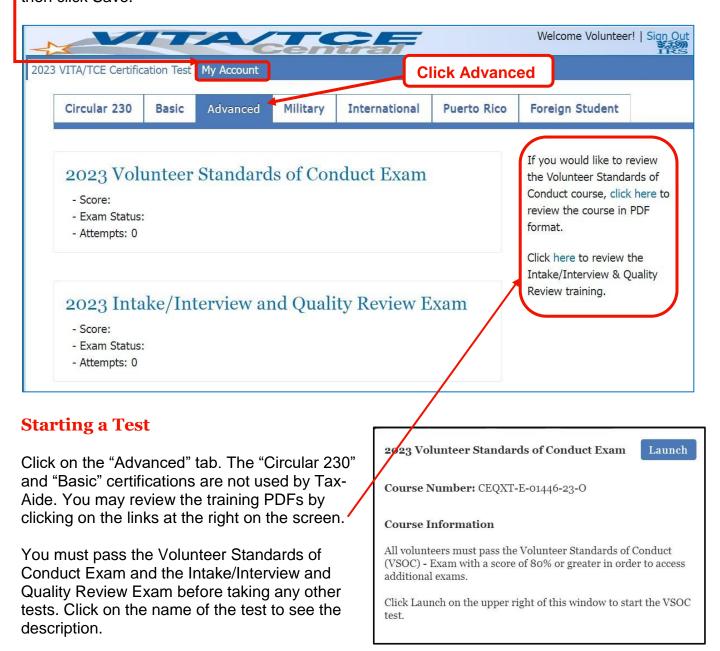




SEID

Update an existing account – Returning Volunteers

For returning volunteers: After you sign in, click the "My Account" tab and update the years of service and any other information that is missing or which has changed (see prior two pages) – then click Save.



You may need to turn off pop-up blockers in your browser. Click the "Launch" button in the pop-up description to start the test. The "Launch" button will not appear until you have passed the prerequisite tests. Read the instructions on the introductory page and click "Start Assessment".

Instructions for Taking the Tests

2023 Volunteer Standards of Conduct Exam

Exit Course

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2023 Volunteer Standards of Conduct Exam

Use your training and reference tools to answer the questions. You must answer eight of the following ten questions correctly to pass the Volunteer Standards of Conduct test.

Click the 'Start Assessment' button to begin the Volunteer Standards of Conduct (VSOC) exam

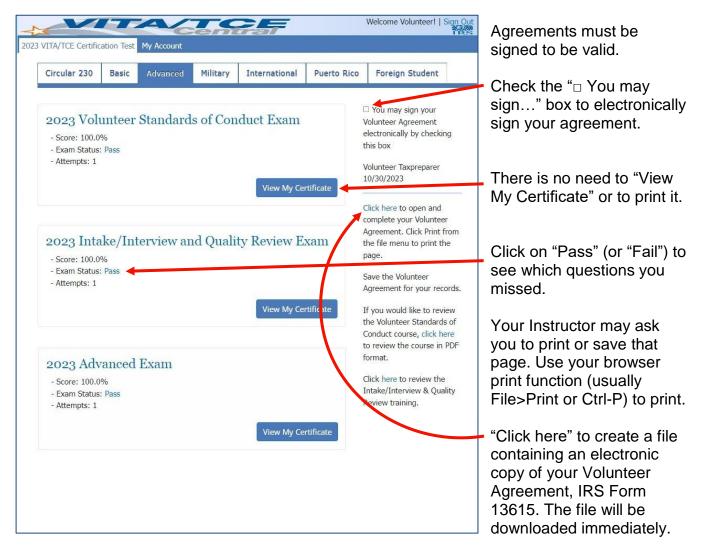
Start Assessment

- You must score 80% to pass each test.
- We recommend that you complete all scenarios and mark your answers in the Form 6744 test booklet first, before going online to record your answers. It can be helpful to read and answer the retest questions at the same time.
- Don't guess. This is an open book test. Use the training materials. Take all the time you need. However, no consultation with any other person is allowed.
- Read the online questions carefully, to ensure that they match the test booklet.
- All questions are multiple choice or fill in the blank.
- When entering a dollar value, use only numbers (and a minus sign, if needed), and always round to the nearest whole number (enter -1234 – not -\$1,234.32). Do not type a space before or after the value. Press Tab after typing the value.
- After choosing an answer, wait for the NEXT button to turn from gray to black before clicking it (or your answer may not be recorded).
- Check your answers on the review page before submitting them. You may change them before submitting, but you will not be able to go back later to see your answers.
- You do not have to complete a test in one sitting. You can exit the test at any point by clicking 'Exit Course' in the upper right and signing out.
- You have two tries to pass each test. If you do not pass a particular test, you must take
 and pass the retest, which has different questions. We recommend that you confer
 with your Instructor before taking a retest as failing it disqualifies you from any
 position requiring that test.

After Passing the Tests

CONGRATULATIONS! YOU PASSED - now what?

When you have completed and passed all required tests and any optional tests you plan to take, you must electronically sign your Volunteer Agreement and then save it. Your Instructor will provide details, and will usually ask you to attach your agreement to an email to a local Instructor or other local leader. Do NOT send the agreement to the IRS or to the national Tax-Aide office.



Check your Downloads folder for the file, or check "My Drive" at https://drive.google.com if using a Tax-Aide Chromebook. The file name may be different than last year (e.g., "Form_13615_Rev._10-2023_*.pdf"). Rename, print or email the file as directed by your Instructor. Page 2 of the form has your electronic signature as well as the results of your tests.

Volunteer Agreement

The first page of the volunteer agreement contains the Volunteer Standards of Conduct that are a part of your agreement. Review and keep a copy of this with your records.

The second page is shown here, and will be pre-filled with your personal information, the results of your tests, and your electronic signature.

Volunteer: By signing this form, I d comply with the standar		*							
Full name (please print)				Volu	Volunteer position(s)				
Your name						1	RS Employee		
Home address (street, ci		04.4							
The second secon	, Your City, Yo		•			20 191	1.0 100		
Email address		Daytime telephone				oring partner n	name		
Your email address			Your telephone #		The state of the s	RP Tax-Ai	02	20 00000	
Number of years volunteered (including this year)		ar) Signa				ature (type/print		Date	
					Electronic Signatur				e
	Volunteer Ce	rtification L	evels (Add the	e letter "P" fo	r all passing	g test scores)			
Volunteer Standards of Conduct	Intake/Interview & Quality Review	Site	Site Basis Adv.		Militory	1-1	Puerto	Rico	Foreign
(Required for ALL)		Coordinat	itor Basic	Advanced	Military	International	1	2	Students
P	P			P					
Optional Tests		· .			-	•			
Federal Tax Law U	Jpdate Test Only for C	Circular 230	Professionals	(C230)					
Federal Tax Law Update To certification. The license info Handbook for Partners and S Note: Advanced certification to Publication 5362, Fact Sh	ormation below must be co Site Coordinators, for addi h is necessary to qualify for	mpleted by the tional requiren r Continuing E	e voluntéer and v nents and instruct ducation (CE) Cr	erified by the pa tions. edits. The C230	rtner or coord	finator. Refer to P	ublication	5683, VI	TA/TCE
Professional designation (Attorney, CPA, or Enrolled Agent) (state)		The second secon		ense, registration, or ent number		Effective o ssue date	2.11	xpiration date f provided)	
Coordinator, Sponsoring government-issued photo						verified the requi	red certific	cation le	vel(s) and
Approving Official's name and title (printed) (coordinator, sponsoring partner, instructor or IRS contact)			Signature (electronic)		Signature (type/print)			122	Date

NOTE: The test results show only Pass/Fail. Your Instructor will not see your actual test scores. If you passed the Site Coordinator or other tests then these will also have a P. Your Instructor or other local Approving Official must verify and sign the form. Electronic or typed signatures are allowed. When you have completed all additional certification requirements, your certification will be logged in the Tax-Aide Volunteer Portal.