

## Taking the IRS Tests Online

Volunteers have several IRS certifications tests to complete with a passing grade in Link & Learn before they are certified to assist Tax Aide. The number of tests vary with the volunteer assignment. Listed below are the Mandatory tests required for the volunteer assignments.

### **Mandatory for Tax-Aide Client Facilitators**

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

### **Mandatory for Tax-Aide Counselors**

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

### **Optional**

The Qualified Expert Volunteer Exam (QEV) is an optional exam, which is recommended for Quality Review volunteers. It is not required by AARP and does NOT replace the Advanced Exam requirement. The QEV Exam does not provide the volunteer with CE credits.

Note: The previous *Health Savings Accounts (HSA) Exam* is now included in the Advanced Exam, so all certified Counselors will be certified for taxpayers with HSA accounts.

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 (VSOC Training) course link on the VITA/TCE Central page or from the IRS web site at [www.irs.gov](http://www.irs.gov). It is also available on the Az website Training tab at [www.aztax-aide.org](http://www.aztax-aide.org)

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.

Online training for 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.**

IRS Publication 4012 *VITA/TCE Resource Guide* will be available in print form before the tax season begins. It is available electronically from [www.irs.gov](http://www.irs.gov) It is recommended that you use the electronic version from the National Tax Training Committee (NTTC) available at [www.aztax-aide.org](http://www.aztax-aide.org).

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

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

The screenshot shows the VITA/TCE Central website home page. The header features the VITA/TCE Central logo and the IRS logo. Below the header, there are three main sections: Certification Tests, Instructor Tools, and Quick Links. The Certification Tests section includes a login form with fields for Login Name and Password, and buttons for Login, Create Account, and Forgot Password? (with a link to CLICK HERE). The Instructor Tools section lists Classroom Presentations, Lesson Plans, and Instructor Guide 4555e. The Quick Links section lists various resources like Link & Learn Taxes Lessons, Certification Test/Retest PDFs, VITA/TCE Training Guide PDFs, Evaluations, Practice Lab, VSOC Training, and Intake/Interview and Quality Review Training. Three callout boxes with arrows point to specific elements: 'Returning volunteers login here' points to the Login button, 'New volunteers start here' points to the Create Account button, and 'Forgotten password' points to the 'CLICK HERE' link under 'Forgot Password?'. At the bottom, there is a note about the TaxSlayer Practice Lab and a generic password 'TRAINPROWEB'.

**Certification Tests**

Login Name:  
Login Name

Password:  
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

**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

**Returning volunteers login here**

**New volunteers start here**

**Forgotten password**

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 former 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 have forgotten your Login Name or changed your e-mail address, follow the below 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 shown below carefully.



My account details

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

- \* Group:
  - 01 - VITA Volunteer
  - 02 - TCE - AARP Volunteer
  - 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

\* 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:

\* First Name:

\* Last Name:

SEID:  (For IRS Employees Only)

\* Username:

Password: [Change Password](#)

\* 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:

\* Time Zone:

Partner/Organization Name:

\* Years You Have Volunteered:

Professional status for Continuing Education credits or Circ 230 ONLY:

PTIN Number:

[PTIN Validation Information](#)

Name as listed on PTIN Card:

CTEC Number:

[CTEC Validation Information](#)

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

Select 02 – TCE – AARP Volunteer

Select YES if you are a Local Coordinator

Select Pub 4491 – Training Source

Complete remaining fields with your information.

Leave SEID field blank

Select AARP Tax-Aide in the Partner Name field

Complete Status and PTIN/CTEC fields if you are seeking CE credits

Returning Counselors update your Years of Service and any other information that may have changed.

Click on the **Advanced Tab**

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.
<a href="#">Volunteer Standards of Conduct Exam</a>			0	
<a href="#">Intake/Interview and Quality Review Exam</a>			0	
<a href="#">Advanced Exam</a>			0	
<a href="#">Health Savings Accounts (HSA) Exam</a>			0	

From this screen you may:

- Review the Volunteer Standards of Conduct course
- Review the Intake/Interview & Quality Review course
- Take the Volunteer Standards of Conduct exam
- Take the Intake/Interview and Quality Review exam
- Take the Advanced exam

The exams must be taken in order. You do not have to complete an exam in one session. You may close the exam at any point and log out. When you log back in Link & Learn will remember where you left off.

If you do not pass any exam with an 80% or higher score, you will need to take and pass the re-test for that level of exam. It is recommended you consult with your instructor before taking the re-test as failure will disqualify you from your assignment at Tax Aide.

Once you have completed all the required exams successfully for your assignment, you can view, print, and save your Volunteer Agreement. This Agreement is proof of your Certification for the tax year of the exam.

You will need to send an electronic copy (attachment) of your Volunteer Agreement to either your instructor or direct supervisor. You will receive instructions as to whom requires the certificate.

The screenshot shows the VITA/TCE Central website interface. At the top, there is a navigation bar with 'VITA/TCE Certification Test' and 'My Account'. Below this is a menu with tabs for 'Basic', 'Advanced', 'Military', 'International', 'Puerto Rico', and 'Foreign Student'. The 'Advanced' tab is selected. A table displays exam results for four courses, all with a score of 100.00%. The 'Pass/Fail' column contains 'Pass' and 'Print Certificate' links. A red box highlights these links. To the right of the table, there is a checkbox labeled 'You may sign your Volunteer Agreement electronically by checking this box', which is checked. Below the checkbox, there is a link to 'Click here to open and complete your Volunteer Agreement' and a note to 'Save the Volunteer Agreement for your records.'

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	<input checked="" type="checkbox"/> You may sign your Volunteer Agreement electronically by checking this box
<a href="#">Volunteer Standards of Conduct Exam</a>	100.00 %	<a href="#">Pass</a> <a href="#">Print Certificate</a>	1	<a href="#">Click here to open and complete your Volunteer Agreement.</a> Click Print from the file menu to print the page. Save the Volunteer Agreement for your records.
<a href="#">Intake/Interview and Quality Review Exam</a>	100.00 %	<a href="#">Pass</a> <a href="#">Print Certificate</a>	1	
<a href="#">Advanced Exam</a>	100.00 %	<a href="#">Pass</a> <a href="#">Print Certificate</a>	1	
<a href="#">Health Savings Accounts (HSA) Exam</a>	100.00 %	<a href="#">Pass</a> <a href="#">Print Certificate</a>	1	

- **Do NOT use the “Print Certificate” links**
- 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. Page 2 of the form has your electronic signature as well as the results of your tests.

