

Taking the Tests Online - NOTE: Ignore screen shots with 2015 or 2016.

Starting in tax year 2015, the IRS added a new test. Counselors now have three mandatory tests and one optional test. New this year, Client Facilitators are now required to pass the *Intake/Interview and Quality Review Exam* in addition to the previously required *Standards of Conduct Exam*.

Mandatory for Tax-Aide Counselors

- Volunteer Standards of Conduct Exam
- Intake/Interview and Quality Review Exam
- Advanced 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 (new this year). That exam and the *Advanced Exam* are 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.

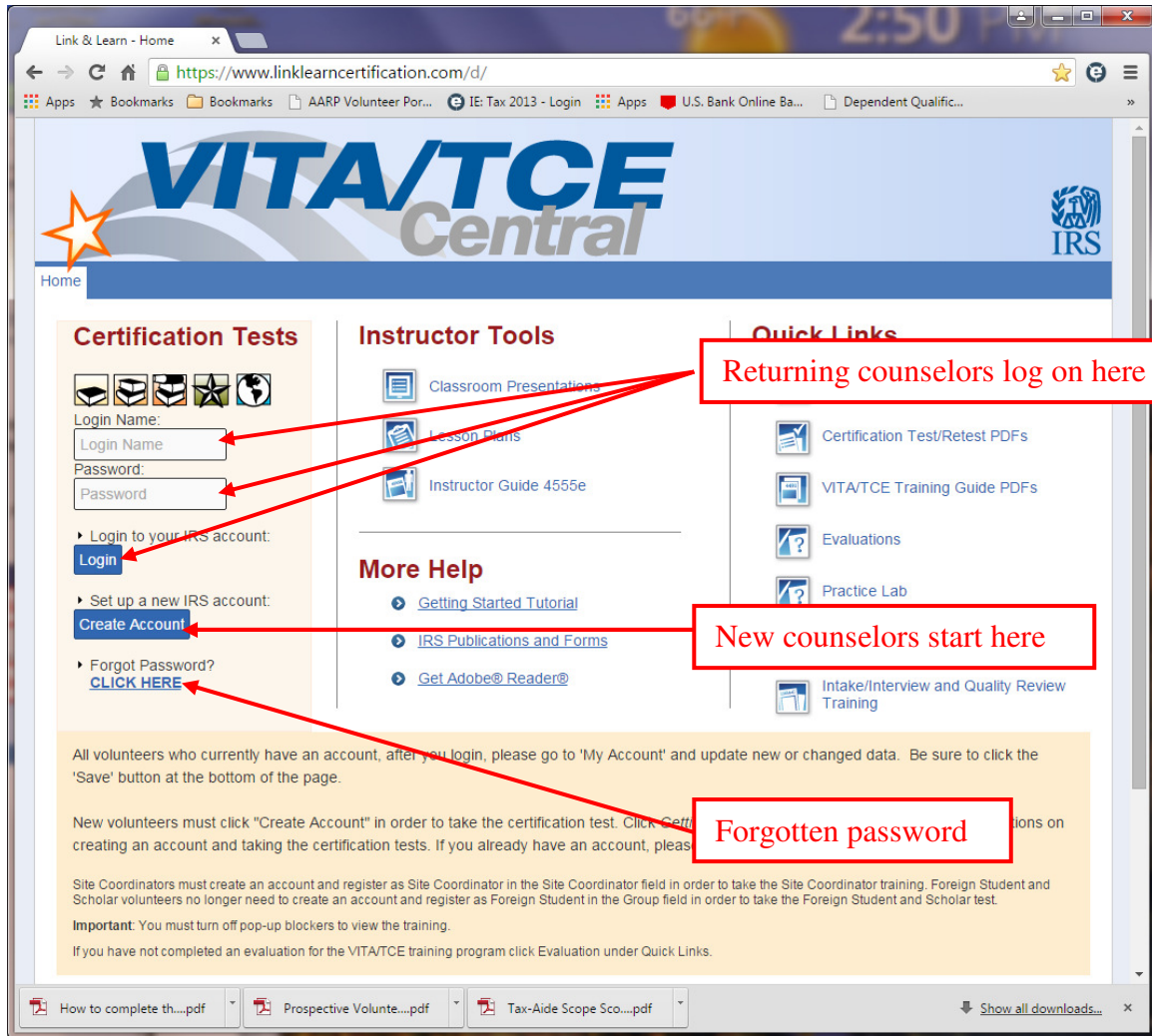
Training for the *Intake/Interview and Quality Review Exam* is in IRS Publication 5101. This publication can be downloaded from the sites as mentioned above. Even if you think you can pass the exam without studying, this is very useful information that should not be ignored.

Online training for both the *Advanced Exam* is available through the IRS Link & Learn web site at <https://apps.irs.gov/app/vital/>. 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 4012 in your training materials. IRS Publication 4491, the *VITA/TCE Training Guide* is available only online this year. 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.

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.”

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.

[Register](#)

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.

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

The screenshot shows a web browser window with the URL https://www.linklearcertification.com/d/edit_registration_irs/. The page is titled "2015 VITA/TCE Certification Test My Account". The form is titled "My account details" and includes the following fields:

- * 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: rffranc
- Password: Change Password
- * Email Address: rffranc@comcast.net
- * Confirm Email Address: rffranc@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.

A red box highlights the "Years You Have Volunteered" dropdown menu, which is set to "7". A red arrow points from this box to the text "Years you have volunteered".

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

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 titled "2016 VITA/TCE Certification Test My Account". This section contains a horizontal menu with six tabs: "Basic", "Advanced", "Military", "International", "Puerto Rico", and "Foreign Student". The "Advanced" tab is currently selected and highlighted in blue. A red arrow points from a red box labeled "Advanced Tab" to the "Advanced" tab. Below the menu is a table with the following columns: "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" values are 0. To the right of the table, there is a text box with instructions: "If you would like to review the Volunteer Standards of Conduct course, click here to review the course in PDF format." and "Click here to review the Intake/Interview & Quality Review training." At the bottom of the page, there is a 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			

Advanced tab options

Link & Learn - 2015 VITA/ x
https://www.linklearncertification.com/d/learning_series_irs/778/#program/1451/view

Welcome Robert! | Lo

VITA/TCE Central

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	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.
2015 Intake/Interview and Quality Review Exam			0	
2015 Advanced Exam			0	
2015 Health Savings Accounts (HSA) Exam			0	

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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 “2016 Volunteer Standards of Conduct” exam
- ❖ Take the “2016 Intake/Interview and Quality Review” exam
- ❖ Take the “2016 Advanced” exam
- ❖ (Optionally) Take the “2016 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)

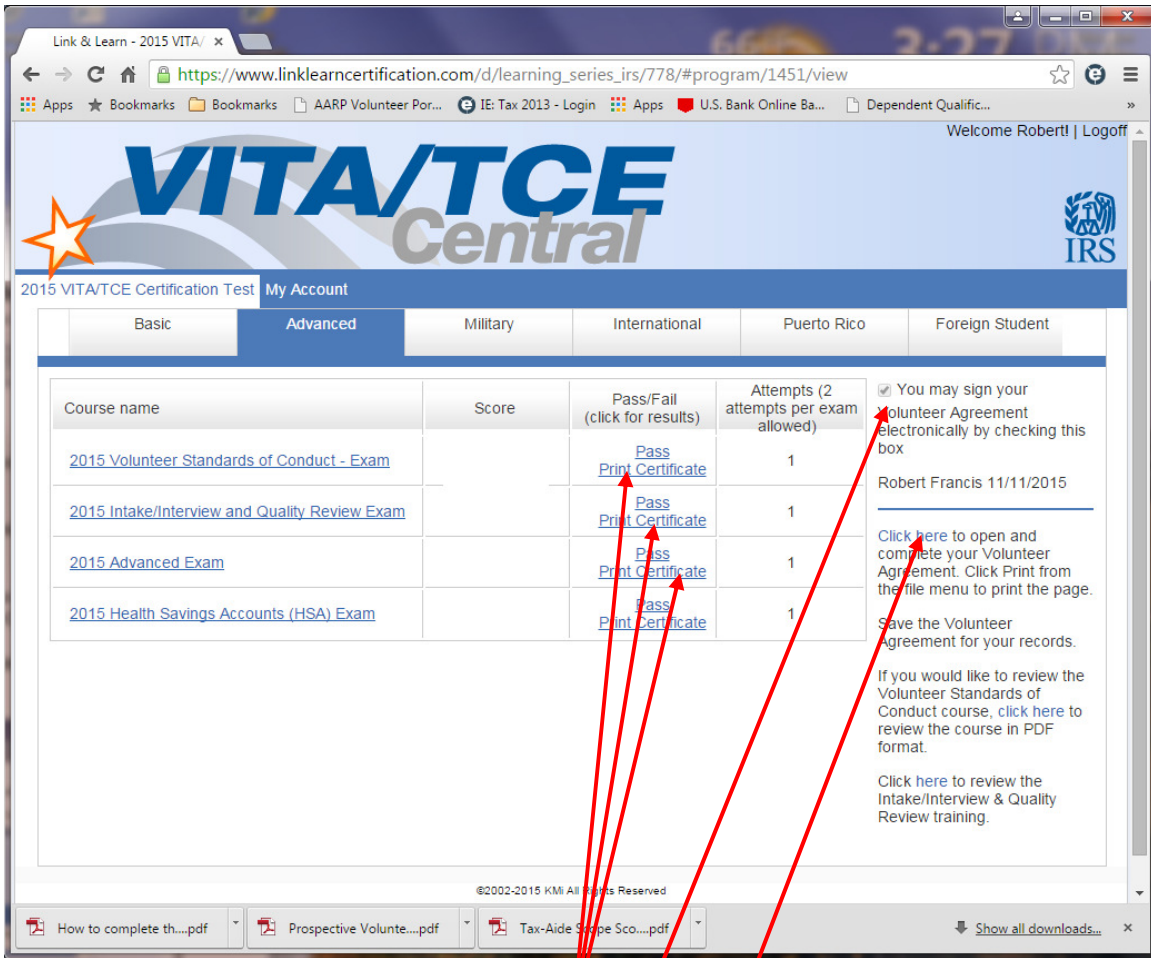
You do not have to complete a test in one sitting. You can close the test at any point, log off and then log back on at a later time. The software will remember your progress in the test.

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

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

Cancellation of Debt is now included in the “Advanced” certification.

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



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.

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

Link & Learn - 2015 VITA/ x agreement.pdf x

file:///C:/Users/Bob/Documents/AARP/Volunteer%20... IE: Tax 2013 - Login

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) 02 - TCE - AARP Volunteer IRS Employee - VITA/TCE Volunteer

Home street address: civ. state and ZIP code _____

Email address _____ Daytime telephone _____

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		Foreign Students
								1	2	
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

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

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

Total hours volunteered _____ (qualifies for 14 CE credits)

OR

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

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)

agreement.pdf How to complete th...pdf Show all downloads...

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.