

Frequently Asked Questions – Link & Learn Taxes Volunteer Certification Test

for SPEC Partners and Employees

This publication provides information about the volunteer courses and certification tests on Link & Learn Taxes.

Background

Link & Learn Taxes provide online workout lessons and certification tests for individuals interested in volunteering for the Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs. All volunteers are required to register and certify via Link & Learn Taxes. Online testing is fast and efficient; it provides test results immediately. Volunteers who do not pass the test the first time may review the course material and try again. The certification test can be completed on paper utilizing Form 6744, VITA/TCE Volunteer Assistor's Test or Retest. Volunteers choosing this method must transcribe their answers to the test in Link & Learn Taxes to meet the requirement for all volunteers to register and certify through Link & Learn Taxes.

There will be a **new** Link and Learn Certification testing site for tax year 2023. Users **will be required** to reset their password to access their account. Users will have to use the "forgot password or username" link to create a new password. The system is not yet operational and will be turned on in mid to late November. Last year's certification link is still active but will not be updated for the 2023 filing season. Users will get an email from the vendor, Red Cedar Consultancy, advising them of the new link. It's not a scam message. The new link for the certification is:

<https://linklearntaxescertification.com>

Questions and Answers

1. **Q: How do I access the online test?**

A: You can either log in directly at

<https://linklearntaxescertification.com> or you can select VITA/TCE Central from the **Link & Learn Taxes** page.

If you have an existing account, you must reset your password using the Forgot Password link. If not, create a new account. You can self-register at: <https://linklearntaxescertification.com>. After logging in, select your

preferred certification level from the tabs along the top of the screen. You must first complete the Volunteer Standards of Conduct and the Intake/Interview and Quality Review test. When you are ready to complete any subsequent exams, click on the exam link and select “Launch” from the upper right-hand corner of the pop-up box. If the word “Launch” does not appear, you have not yet completed a prerequisite for the exam you selected.

2. **Q: What is the passing score for certification?**

A: The passing score is 80% or higher.

3. **Q: What if I do not pass a test on my first attempt?**

A: If you are taking the paper test, Form 6744, VITA/TCE Volunteer Assistor’s Test/Retest, there is a retest following each test. The retest asks different questions for the same scenarios used in the original test. The online test allows a total of 2 attempts at certification for each test. The questions for the test and retest will be in order.

4. **Q: What if I am unable to complete an online test in one session?**

A: The online system will bookmark where you stop in an online test. When you log back in, the system will show “In progress” for the test you were taking. Just click on that link to continue with the test.

5. **Q: What if I need to change an answer on the online test?**

A: In the online test, you can use the “Back” button to change your answer to a question. There will be a message displaying your answer and any questions that you have not answered at the end of the test. You must complete all questions and then hit the “Submit” key. The “Help” link provides tips to avoid input errors. Once you hit the “Submit” key, you cannot change your answers.

6. **Q: Are there any helpful hints for taking the online test?**

A: When entering a fill-in answer, use only numbers. Do not use symbols such as dollar signs, commas, or decimal points or the answers will be incorrect. It is also important to review **Volunteer Tax Alerts (VTAs) 2024** prior to taking the online certifications.

7. **Q: What documentation can I obtain if I certify through the online test with Link & Learn Taxes?**

A: Once you successfully complete a test, you can print a course certificate. You can also print or save a copy of the Form 13615, Volunteer Standards of Conduct Agreement. Volunteers can sign Form 13615 electronically.

8. **Q: What if I forget my password for the online test?**

A: At the bottom of the online test login screen, use the “Forgot Password” reset tool at <https://linklearntaxescertification.com> and enter the e-mail address associated with the account to regain access. Be sure to enter your email address correctly during the registration process so you will receive e-mail notifications about your login name or password. If you are still not able to reset your password, you can contact the help desk at wi.spec.products@irs.gov.

9. Q: What if I do not receive the e-mail after using the “Forgot Password” reset tool?

A: First, check to see if the e-mail is in your junk or spam mail folder. If not, our team can reset your password manually, but to do so we'll need:

- the mailing/home address associated with your account
- username
- email address associated with your account
- the approximate month/year you created this account

Send this information to: wi.spec.products@irs.gov. This mailbox is monitored during business hours only. E-mails received after hours or on the weekend will be answered the next business day.

10. Q: Can I use references to complete the test?

A: The test is an open book test. You can use forms, instructions, and other reference material to take the test. You should complete the test on your own.

11. Q: Who should I contact if I have issues accessing the Practice Lab?

A: The VITA/TCE Certification Test Site account is separate from the TaxSlayer or Practice Lab account. You can access the TaxSlayer Practice Lab at <https://vita.taxslayerpro.com/IRSTraining>. The Practice Lab provides a simulated VITA/TCE learning environment in the TaxSlayer Pro Online software and includes learning tools and TaxSlayer support. For password or login help with Practice Lab or additional information, go to: <https://vita.taxslayerpro.com> or email support@vita.taxslayerpro.com.

Note: Please use the generic password “TRAINPROWEB” to access the Practice Lab.

12. Q: What tax year does the test use for answers to the questions?

A: The answers are based on 2023 tax rates, adjustments, and deductions. Tax year 2023 VITA/TCE training materials, tax forms, instructions and publications are available on www.irs.gov. Draft tax forms may be available to review if the 2023 versions have not been completed.

13. Q: Do I have to take the Basic course before taking any of the other courses?

A: Review course material in Publication 4491, VITA/TCE Training Guide. Then review the lessons online at Link & Learn Taxes by taking the interactive quizzes and workout exercises. The instructions for reviewing the lessons on Link & Learn Taxes and the instructions for certification on the online test site are different.

- Instructions for reviewing the lesson information online: The Basic tab includes just the Basic course. The Advanced tab includes all Basic and Advanced information. The optional courses contain the information for that subject. If you received training in a classroom setting, virtual learning session or by using the Publication 4491, you may continue

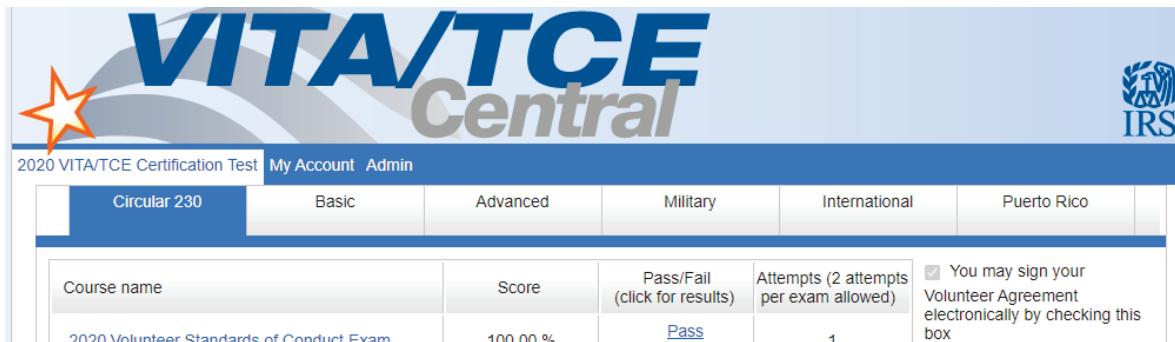
directly to the online test without reviewing the Link & Learn Taxes workout exercises.

- Instructions for certification online: For certification testing, you must first pass the Volunteer Standards of Conduct and the Intake/Interview and Quality Review tests. You can then choose either the Basic, Advanced, or Foreign Students and Scholars test.

Note: You do not need to complete the Basic test before taking the Advanced, Circular 230 or specialty test.

- VITA/TCE volunteers with the professional designation of attorney, certified public accountant or enrolled agent have the option to certify on new provisions and tax law changes by completing the Circular 230 Federal Tax Law Updates Test. These volunteers are required to certify on the Volunteer Standards of Conduct and the Intake/Interview & Quality Review tests. The tests are available on Link & Learn Taxes and printed in the Form 6744, VITA/TCE Volunteer Assistor’s Test/Retest. Eligible volunteers are authorized to prepare all tax returns within the scope of the VITA/TCE program once certified.

The Circular 230 Exam tab appears to the left of the Basic tab. If you don’t see the tab, roll your cursor over the area to the left of the Basic tab. Click the arrow and the Circular 230 tab will appear. If you don’t see the arrow, click My Account, and confirm that you have a correct professional status selected from the drop-down menu.



14. Q: Where is the Site Coordinator test?

A: A certification test is needed for site coordinators and alternate coordinators. To make the Site Coordinator test available, select “yes” next to Site Coordinator on the self-registration page. The certification will then be available to you.

15. Q: Do all volunteers who use OPI need to complete the SPEC OPI certification test or only the site coordinators?

A: The site coordinator will determine whether to require volunteers to take the OPI certification or if they will provide the training directly. All volunteers can access the training as part of their 2023 tax year certification on Link and Learn Taxes (and will need to provide the SIDN). The OPI certification is optional with a prerequisite to the Volunteer Standards of Conduct.

16. Q: If I registered and created an account last year, do I have to register again this year?

A: No, If you have an existing account, you must reset your password using the Forgot Password link. If you don't have an account, create a new account. You can use the same login just change your password. Volunteers must not have more than one account in the system.

17. Q: How can I update my information on the online test?

A: Log into the online test and click the "My Account" tab to make any updates. Update any changes to your group, address, email, daytime telephone number and total number of years you have volunteered for the program. If you want to receive Continuing Education credits, make sure you select your professional status, PTIN, name and CTEC number if applicable. Click the "Save" button at the bottom of the page to save your changes.

18. Q: What actions should I take if I can't register or update My Account page?

A: If you have identified yourself as a Non-Credentialed Tax Preparer in the Professional Status field, the IRS now requires that you also provide your PTIN. If you do not have a PTIN, change the professional status field to "Select role for CE Credits."

19. Q: Can I create another account if I can't login into my current account?

A: No. If a volunteer registers more than once with the same email account, they will get a notification that the system only allows one account per email address. If volunteers already have an account, the system will not allow a new account to be created with the same email address. Volunteers must use the password reset function for this new certification site.

20. Q: How do I obtain the answer key to the certification tests?

A: Links for Publication 4189, VITA/TCE Test/Retest Answers, will be accessible electronically in the lower left corner of the homepage. Volunteer instructors, site coordinators and SPEC territory managers will only be able to view the answer key after they achieve a passing score of 80% or higher and select the applicable role. Volunteer instructors, site coordinators and SPEC territory managers must update their profile and select the applicable role on the "My Account" tab for the 4189 links to generate.

21. Q: How do I get continuing education credits?

A: Refer to the instructions in **Publication 5362**, Fact Sheet for VITA/TCE Partners and Volunteers: Continuing Education Credits.