

December 2024

## 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** provides 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 2024. 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://linklearncertification.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://linklearncertification.com>**/. After logging in, select your preferred certification level from the icon list. 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 **Start**.

**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 "Continue" 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. 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) 2025** 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: Use the "Forgot Password" reset tool at <https://linklearncertification.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: [linklearnsupport@Archsystemsinc.com](mailto:linklearnsupport@Archsystemsinc.com).

**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

- email address associated with your account
- Send this information to: [linklearnsupport@Archsystemsinc.com](mailto:linklearnsupport@Archsystemsinc.com). ***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](mailto: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 2024 tax rates, adjustments, and deductions. Tax year 2024 VITA/TCE training materials, tax forms, instructions and publications are available on [www.irs.gov](http://www.irs.gov). Draft tax forms may be available to review if the 2024 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 a 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. This exam will appear only for volunteers with a professional designation of **Attorney, Certified Public Accountant (CPA), or Enrolled Agent** indicated in the Professional Status drop-down menu during registration. To confirm or change your professional status after you have registered, go to your Profile, and make the change on the appropriate screen.

**14.Q: Where is the Site Coordinator test?**

A: The Site Coordinator test is in the list of certifications. Volunteers registered as Site Coordinators are also required to complete the Site Coordinator training course. If you did not select the Site Coordinator training course when you registered, you can change your selection in your profile.

## Certifications

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### 01 - Basic

The 2024 Basic certification includes: the 'Volunteer Standards of Conduct Test', the 'Intake/Interview and Quality Review Test', and the 'Basic Test'. This is a good place to start if you only need to take VSC and Intake/Interview. Training documents are available for Volunteer Standards of Conduct and Intake/Interview and Quality Review .

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### 02 - Advanced

The 2024 Advanced certification includes: the 'Volunteer Standards of Conduct Test', the 'Intake/Interview and Quality Review Test', and the 'Advanced Test'. Training documents are available for Volunteer Standards of Conduct and Intake/Interview and Quality Review .

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### Federal Tax Law Update Test for Circular 230 Professionals

Welcome to the Federal Tax Law Update Test for Circular 230 Professionals. This test is for volunteers who are authorized under Circular 230 to practice before the IRS. These volunteers must have a professional designation of Attorney, Certified Public Accountant, or Enrolled Agent. Volunteers who complete this certification level can instruct and prepare any tax returns that fall...

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### Foreign Student

Welcome to the Foreign Student certification. The exam requires you to prepare tax returns and then answer several online questions. You must successfully complete the exam with at least an overall 80% proficiency to earn VITA/TCE certification. Training documents are available for Volunteer Standards of Conduct and Intake/Interview and Quality Review .

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### International

Welcome to the Link and Learn Certification exam for VITA/TCE. The International Exam requires successful completion of the Advanced Exam. You must complete the exam with a minimum score of 80% (12 correct out of 15 questions) to earn certification. Training documents are available for Volunteer Standards of Conduct and Intake/Interview and Quality Review .

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### Military

Welcome to the Link and Learn Taxes Certification test for VITA/TCE. This Military Exam requires successful completion of the Advanced Exam. You must complete the test with a minimum score of 80% (12 correct out of 15 questions) to earn certification (only available upon successful completion of the Advanced Exam). Training documents are available for Volunteer Standards of Conduct...

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### Puerto Rico

Welcome to the Puerto Rico Link and Learn Taxes Certification exam for VITA/TCE. There are two levels for the Puerto Rico exam, Level I PR and Level II PR. You must complete the exam with a minimum score of 80% (12 out of 15 correct). Volunteers must pass either the Basic or Advanced Exam in order to proceed on to the Puerto Rico Level I Exam. Volunteers must pass the Level I PR Exa...

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### Site Coordinator

The Site Coordinator Training is mandatory for all coordinators and focuses on current critical updates for the current filing season. This training includes quality site requirements (QSR) and QSR areas for improvement. The Site Coordinator test first requires the successful completion of the Volunteer Standards of Conduct Exam and the Intake/Interview and Quality Review Exam. Training docu...

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**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 2024 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: You can always update or change your personal information, group, professional status, email address, or password by clicking on **your initials** in the upper right-hand corner of the screen. A drop down will appear, then click on **Profile**.

**18. Q: What actions should I take if I can't register or update my Profile?**

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 log 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: 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 in their profile 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.