



United Way Free Tax Prep Program Certification Instructions

Position: Tax Preparer-Advanced, 1st Year Volunteer

Getting Started:

Visit <https://www.linklearncertification.com/d/> to access the Training Guides, Lessons, Practice Lab and Certification Tests.

VITA/TCE Central

Home

Certification Tests

Login Name:

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

More Help

- ▶ [Getting Started Tutorial](#)
- ▶ [IRS Publications and Forms](#)
- ▶ [Get Adobe® Reader®](#)

Quick Links

- [Link & Learn Taxes Lessons](#)
- [Certification Test/Retest PDFs](#)
- [VITA/TCE Training Guide PDFs](#)
- [Evaluations](#)
- [Practice Lab](#)
- [VSOC Training](#)
- [Fact Sheet: Continuing Education Credits](#)
- [Intake/Interview and Quality Review Training](#)

- ✓ Step 1: View the Link & Learn Taxes Lessons
 - a. Choose “Link & Learn Taxes Lessons” under the Quick Links, then choose “Click here to see the content of each course” on the left. Be sure to view the lessons for your level of certification, in this case it is “Advanced”.

Link & Learn Taxes linking volunteers to quality e-learning

Link & Learn Taxes

Home Certification Paths Puerto Rico Foreign Student

WELCOME: Link & Learn Taxes e-Learning [Spanish](#)

Link & Learn Taxes is self-paced e-learning for the Volunteer Income Tax Assistance and Tax Counseling for the Elderly (VITA/TCE) program. This training will instruct you in the VITA/TCE return preparation process and tax law covered in the VITA/TCE program.

[Click here to see the content of each course.](#)

Click the Certifications Paths tab above to select your certification level and access the student and teacher course materials.

[Course Evaluation](#)

VITA/TCE Central

Introducing the new **VITA/TCE Central** your one-stop shop for volunteer training.

VITA/TCE Central lets you find your most frequently used tools on one page—certification tests, training and testing PDFs, evaluations, Practice Lab, instructor tools and more!

Additional training modules (Volunteer Standards of Conduct, Form 13614-C, Intake/Interview and Quality Review Training, optional specialty courses, and Site Coordinator training) are also available on **VITA/TCE Central**.

Additional Resources

- ✓ Step 2: View the Practice Lab
 - a. To access the Practice Lab choose “Practice Lab” from the Link & Learn login page, the password is “**TRAINPROWEB**”. Once you login, you will be prompted to enter your own user name and password to sign-in.

Access Link & Learn Taxes

Hello,

Welcome to the Electronic Tax Software Practice Lab for VITA/TCE volunteers. When you enter this site, you will be able to prepare tax returns to practice what you just learned in Link & Learn Taxes. We recommend that you use the problems and exercises contained in Publication 4491 W, VITA/TCE Workbook, Comprehensive Problems and Practice Exercises. These problems and exercises were specifically designed to cover the types of tax returns that VITA/TCE volunteers encounter at their volunteer sites.

To access the practice lab enter below the password you received from the IRS or your site coordinator. If you do not know the password please contact your site coordinator or local IRS Relationship Manager.

If you are not currently a VITA/TCE volunteer and would like to become a volunteer, please click here to get started: <https://www.irs.gov/Individuals/IRS-Tax-Volunteers>. Your information will be forwarded to sponsoring partners in your area for further contact. You will be contacted within 2 weeks after you have submitted your information.

Enter Password

Login

- b. When you are logged into the Practice Lab, you can work through the videos or the practice lab, it is helpful to do both so you have a full understanding of the functionality of TaxSlayer. Please note, some videos are duplicated under different areas and you also only need to watch those that you are certifying in. For example, a Tax Preparer-Basic, 1st Year Volunteer can skip the Advanced Tax Topics videos, but a Tax Preparer-Advanced, 1st Year Volunteer should watch them.

Practice Lab - Home

Welcome to the practice lab. The links below will help you get a better understanding of the software and best practices regarding tax processes. If you would like to begin using the software in the practice area, please press the link below.

[Go to Practice Area »](#)

<p>Section 1: Getting Started with TaxSlayer Pro Online</p> <ul style="list-style-type: none"> <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Pro Online: Login and Passwords 	<p>Section 2: Configuring TaxSlayer Pro Online</p> <ul style="list-style-type: none"> <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Setting up Site Information <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Setting up Security Templates <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Adding Preparers <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Working with Custom Questions <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Configuring Printing <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Managing Returns <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Working with Reports <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Managing Multiple Sites <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Contingency Procedures <li style="background-color: #0070c0; color: white; padding: 2px 5px;">▶ 2017 TaxSlayer Enhancements 	<p>Section 3: Installing TaxSlayer Pro Online</p> <ul style="list-style-type: none"> <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Contingency Procedures <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Installation and Network Configuration <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Setting up Site Information <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Setting up Security Templates <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Adding Preparers <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Working with Custom Questions <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Configuring Printing <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Managing Returns <li style="background-color: #0070c0; color: white; padding: 2px 5px; margin-bottom: 5px;">▶ Updating and Transferring <li style="background-color: #0070c0; color: white; padding: 2px 5px;">▶ Working with Reports
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- ✓ Step 3: Review the Training Guides for additional information
 - a. To view the training guides, choose “VITA/TCE Training Guide PDF’s” under Quick Links

- ✓ Step 4: Take Certification Exams
 - a. Create an account on the Link & Learn Page under “Setup a new IRS account”, view the [Link & Learn Taxes Getting Started Job Aid](#) for more information
 - b. Once logged in you can take the exams necessary to become certified.
 - c. The certification exam requirements for Tax Preparer-Advanced are below, a minimum score of 80% is required on each exam to pass and you can take each test twice:

Tax Preparer-Advanced 1st Year Volunteer	
Complete	Exam
	Volunteer Standards of Conduct
	Intake/Interview and Quality Review
	Advanced Exam
	Health Savings Exam (Optional but recommended)

- ✓ Step 5: Sign Form 13615, Volunteer Agreement
 - a. Once you have completed your certifications, follow the instructions on the [Link & Learn Taxes Getting Started Job Aid](#) for “Signing Your Form 13615, Volunteer Agreement”
- ✓ Please e-mail or mail a signed copy of Form 13615 to Kristen Synakowski at the information below to verify your training is complete. This form will need to be kept on file, so receipt of this form is required.
- ✓ Once all these steps are completed, you are officially certified. **Congratulations!** I am so excited to welcome you to our volunteer team as a certified Tax Preparer! Please contact me with any questions you may have!

Contact:

Kristen Synakowski, Financial Services Administrator
United Way of the Valley & Greater Utica Area
201 Lafayette St, Suite 201 Utica, NY 13502
E-mail: kristens@unitedwayvgu.org
Phone: 315-733-4691 ext. 234