

Link and Learn Quick Start Guide: (Test Portal)

<https://linklearncertification.com>



Returning Users (from last year): Click “Forgot Password” and enter the e-mail you used last year. You will need to reset your password and verify your e-mail to gain access to your account. The username and password from last season will not work.

If you were a volunteer with another organization last year, please follow these instructions!

New Users: Click “Create New Account”. Volunteers are only allowed one account.

Complete the fields to create your account in the system. Required fields are marked by an asterisk (*), all others are optional.

Make note of your credentials on the Login Reminder sheet in your folder! You will re-use this account to re-certify every year!

User Profile Helpful Hints

Training Source= Link and Learn (e-learning)

Instructor= No

SEID = Leave Blank

SPEC Area = Area 1

Once you select **Create Account**, you will receive the welcome to VITA/TCE screen and verification e-mail. **What does this email say?**

Volunteer Positions (select all that apply)→ Then Click the Green Save Button!

NOTE: Most will select VITA Volunteer

You are now at the home page screen! Before you start the exams, you need to finish your profile!

Click on your initials at the top right and then select **Profile**



Select Form 13615 Details

Sponsoring partner name/site name = United Way of Central Alabama

Years You Have Volunteered=Select 1 if it is your first year. Note: If you have been a VITA or AARP volunteer in a previous year, please include those years in this count.

Professional designation: only select something here if applicable.

Professional Status: This field must be completed by all volunteers requesting IRS SPEC Continuing Education (CE) Credits. Non-credentialed tax return preparers must be participating in the Annual Filing Season Program to be eligible for SPEC CE Credits.

Volunteers that certify by taking the Federal Tax Law Update test for Circular 230 must have a professional designation of Attorney, CPA, or Enrolled Agent. If you choose the Circular 230 option, you are not eligible for CE Credits.

PTIN is a "Preparer Tax Identification Number" issued by the IRS. If you have a PTIN, enter it in the appropriate place on the registration form. The PTIN must start with the letter P, followed by eight digits. Do not include a hyphen. If you do not have a PTIN, leave this field blank. Volunteers requesting CE Credits must provide a PTIN number except for Attorneys, CPAs, and CFPs.



Important Points!!

- You may always update or change anything in your profile by clicking on your initials!
- Reach out to us at taxvol@uwca.org if you have any issues setting up this account! Or call 205-458-2088.
- We recommend completing the exams on paper first in Publication 6744 and then go online to Link & Learn to input your answers for score! You can check pre-check your answers at <https://www.vitaresources.net/studyguides.html>
- **Once the test is scored, you have one chance to review what you missed:** print the results, or note on paper copy of test. **If you did not pass on first attempt, please contact us before retaking**, so that we can review your answers before scoring.

Additional notes - How to retrieve and send your Volunteer Agreement (IRS Form 13615):

1. After logging in to Linklearncertification.com, select the tab for “Volunteer Agreement”



Form 13615, Volunteer Agreement

Certification information

2. Respond to all questions, and then scroll to the end of the page and check the box to sign

☒ I agree to sign form 13615 Volunteer Agreement electronically

Sign Form 13615

3. Make sure that you do not have pop ups blocked for this site. Once signed, click the box that says: “Download signed form”

Volunteer agreement

Signed: Dec 17, 2024

Download signed form

Completed other certification tests? Changed your account information?

Regenerate and sign again

4. Save the downloaded file to your computer using this name format: FirstName_LastName_TY25_Volunteer_Agreement.
5. Attach the file to an email addressed to taxvol@uwca.org