CTA Non-Preparer/Reviewer Certification Instructions
Tax season 2018-2019 (11/16/18)

Get Ready to Test

- All volunteers:
  Take Volunteers Standards of Conduct Training: https://www.irs.gov/pub/irs-pdf/p4961.pdf
- Required for Client Coordinators and any volunteer helping with intake/exit:
  Take Intake/Interview & Quality Review training: https://www.irs.gov/pub/irs-pdf/p5101.pdf

How to Register for Certification (where to log in to take the exams)

- Go to: **https://www.linklearncertification.com**
- Log In using last year's username and password, or "Create Account".
  If you logged in using last year's information, click on the "My Account" tab to verify and update your information- especially "years volunteered".
- For **Group**, enter "1-VITA Volunteer", UNLESS you are also an IRS employee (# 08).
- If you are a Site Coordinator, select "Yes" for "Do you want to take the Site Coordinator Course"
- Select "Yes" for "Do you plan to volunteer in the VITA/TCE Program?
- For Training Source, select "Other"
- **Remember to write down your username and password. (Or better yet, email it to yourself.)**
- Under "Partner/Organization Name" type "Community Tax Aid DC"
- For "Years you Have Volunteered" select "1" if this is your first year, "2" if it is your second, etc.
- "Select Profession status…" do not fill in this field or the other remaining fields unless you have a PTIN CTEC Number or are a CPA, EA or attorney **who wants to request IRS CE credits**.
- After filling in all the information:
  - If you are updating, click the "save" button at the bottom of the screen.
  - If you created a new account, click **Register**. (The button is to the right at the bottom.)

ALL VOLUNTEERS: Volunteer Standards of Conduct (VSC)

- From **www.linklearncertification.com,** Click on: "2018 Volunteer Standards of Conduct Exam"
- When the message box pops up, click on "launch" (If you don't see the link, use a different browser.)
- After you submit your answers, you will see your score. Below your score, you will see an option "Print Certificate". **Do __not__ do this**. Scroll back to the top and click the "x" to close the window.
- You will be returned to the screen listing the courses. If you don't see the word "pass" or "fail" in the Score column, refresh your browser.

Intake/Interview (Required for Client Coordinators and any volunteer helping with tax return intake/exit)

- From **www.linklearncertification.com,** Click on: "2018 Intake/Interview and Quality Review Exam".
- When the message box pops up, click on "launch"
- After you submit your answers, you will see your score. Below your score, you will see an option "Print Certificate". **Do __not__ do this**. Scroll back to the top and click the "x" to close the window.
- You will be returned to the screen listing the courses. If you don't see the word "pass" or "fail" in the Score column, refresh your browser.

Printing & Submitting Volunteer Agreement

After completing **ALL** of your training and test(s):

1. On the right side of the screen, you will see a box that says, "You may sign your Volunteer Agreement electronically by checking this box." **Click the box**
2. Under the box, you will see ***"Click here to open and complete your Volunteer Agreement".***
3. Click on the link. It will generate your volunteer agreement with your test results.
4. Click on the printer icon to print the form. [**If you are unable to print**, bring your username & password your first day. Your Site Coordinator will help you print your agreement.]
5. **Take your photo ID and volunteer agreement to your tax site the first day. (If you volunteer at more than one site, you will need to take one to each site.)**