

Training Option: Link and Learn Taxes Test

- Step 1: Go to www.vita-volunteers.org website
- Step 2: Go to Tax Training.
- Step 3: Go to Link and Learn Taxes http://www.vita-volunteers.org/IRS/IRS_Link_and_Learn_Course.htm
- Step 4: Click on Basic, Intermediate and Advanced Tabs at the top to take the test for each section.
- Step 5: Start Basic Module, Start Intermediate Module, Start Advanced Module.
- Step 6: Under Menu, go to Posttest, Leave IRS website Ok.
- Step 7: Setup Login and Password to take the test(s). Create a new account if necessary.
- Step 8: Take the test
- Step 9: Pass the test with 80% or better for each module to become certified.
- Step 10: After successfully passing each module, print out certificate and volunteer agreement.
- Step 11: Click Home button to print out certificate
- Step 12: Click volunteer agreement tab to print out volunteer agreement with modules passed.
- Step 13: Print out volunteer agreement after completion of highest module to provide to site coordinator and IRS SPEC office.
- Step 14: Mail a copy of Volunteer Agreement to:
VITA certifications, 55 S. Market St. MS 6300TA, San Jose, CA 95113.
- Step 15: View updates to the VITA volunteer website on a regular basis to check on VITA site assignments and other information.

Reminders: Take the test using the Pub 6744, then take Link and Learn Taxes
Have Publication 4012, Volunteer Quick Reference Guide Available