Quick Start Guide: Link and Learn
LinkLearnCertification.com

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1 **Create/transition your account**

Click "Sign in or create account" or "Start learning" to get started.

Returning users (from last year): Click "Forgot Password" and enter the email you used last year. You'll need to reset your password and reverify your email to gain access to your account. The username and password from last season will not work.

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 reuse this account to recertify every year!

User Profile Helpful Hints
- **Training source** = Link and Learn (e-learning)
- **Instructor** = No

**2** **Check your email to continue registration**

Fill out your profile with your volunteer information.

- **Account Information:** Update your name and email address if needed
- **Profile Image:** Upload a profile image (optional)
- **Contact Information:** Confirm your contact information
- **User Profile Details**
  - **IRS SPEC Territory Manager** = No
  - **SEID** = Leave blank
  - **SPEC Area** = Area 1
- **Volunteer Position(s)** = Most will select "VITA Volunteer"
- **Form 13615 Details:**
  - **Sponsoring partner name/site name** = United Way of Greater Richmond and Petersburg
  - **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

Continuing Education (for tax professionals earning CPE credits only)
- This section 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.
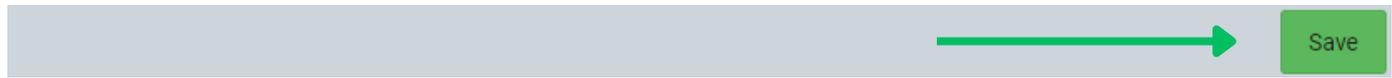
Click the green "Save" button when you are finished setting up your profile.

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3 **Important Points**

- You may always update or change anything in your profile by clicking your initials in the upper right corner and then selecting "Profile."
- Reach out to tax@yourunitedway.org if you have any issues setting up your account.
- We recommend completing the exams on paper first in Publication 6744 and then go online to Link and Learn to input your answers for score.