Fact Sheet

IRS

October 2025

Filing Season 2026: Link & Learn Taxes Certification Reports

for SPEC Employees

Background

The Link & Learn Taxes application provides online courses and certification tests for all individuals interested in volunteering in the Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs.

Link & Learn Certification Reports

These reports provide certification information on volunteers and employees who have completed their certification via Link & Learn Taxes. The volunteer lists can be used to provide partner specific information to sites for validation of certifications. However, the listing must be sanitized to show only the volunteer names that are located at a particular site. Since the lists contain personally identifiable information (PII), you must use secure messaging when you email this within the IRS or to partners. You can also share with partners by phone, fax, or postal mail.

Who Has Access to the Reports?

For the Filing Season, territory managers and designated HQ and area analysts will have access to the reports in Link & Learn Taxes.

How to Access the Reports

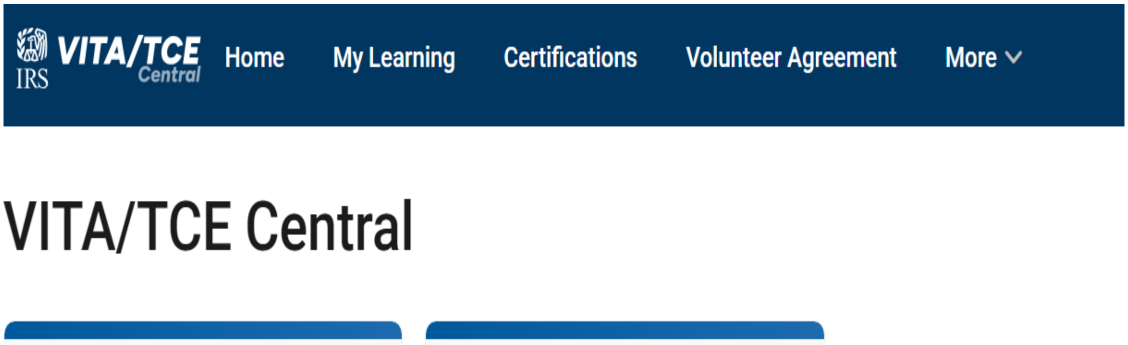
1. If you had report access last year and use your login from last year, you will still have report access. Skip steps 2 through 4.

2. Complete the self-registration on the Link & Learn Taxes test server (VITA/TCE Central). Use the following link for direct access to the test server: **https://linklearncertification.com/**

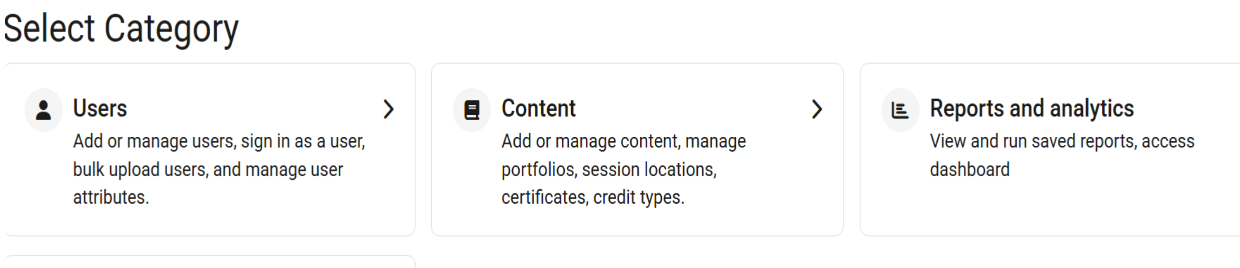
3. Safeguard your login and password for future use. There is a Forgot Password link on the login page which requires you to provide an email address. A password will then be sent to your email account within 15 minutes.

4. To request reports access: Send an email to PS&A with your first and last name used in your registration, e-mail, and SEID and confirm that you have registered.

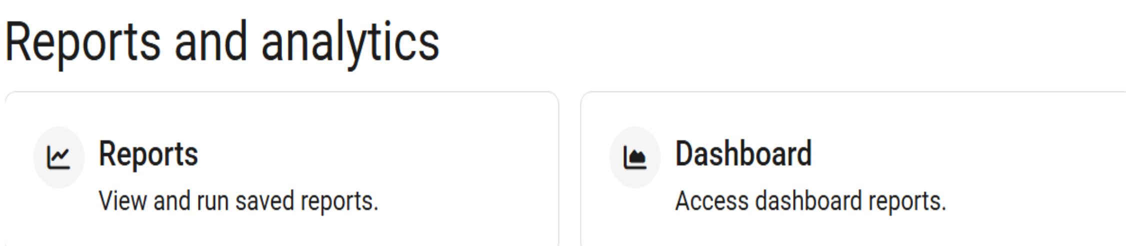
5. Once logged in, look for the More menu at the top and click to reveal the Admin Site link. Click the Admin Site link to navigate to the administrator tools.



6. Within the administrator tools, click the tile for Reports and analytics, then click the Reports option to see all available system reports.



7. Select the report type you need. To generate the report, click the Add a new report button. You must give the report a title. You can modify the title later if needed. The report title should be something meaningful for your use case.



8. Once the report has a title, you can configure the parameters. Parameters can be adjusted at any time by editing the report.

9. Choose any date range from the dropdown menu. If Fixed range is selected, enter the start and end date. Note that these dates will not change relative to when the report is generated.

10. The report schedule options allow administrators to set a cadence when the report will be auto generated. Administrators will receive an email notification when the report is ready. The options are weekly or monthly and which day of the week to execute the reports.

11. The report allows filters by user attribute. User attributes reflect the user profiles. Attribute filters are not required to run the report but may help narrow the scope of data in the report.

12. Once the Title, Date Range, Report Schedule (optional), and User Attributes (optional) are defined, Save the report to return to the report summary page. Click Generate to create the report file. When it is ready, click Download to download the report file to Excel. Large reports may take a few minutes to generate.

13. On the **Volunteer List**, territory managers can now select the report and filter by **Area and then by Territory number**. You can also filter by Group or Exams. These reports open in Excel so you can copy the report to your own Excel spreadsheet for sorting. The columns for the course completion date will need to be converted to a date format in Excel. If the report is slow or you receive an error message, retry. If problems continue, contact your area analyst.

14. The **Volunteer List** includes the following information of the individual certified: territory, SEID (IRS employees only), last name, first name, address, city, zip code, email, group, date signed, years of service, PTIN number, course completion and test score. All courses and test completions display in this report.

15. There may be overlap between areas since the reports are sorted by the **zip codes** from the test taker's registration information on Link & Learn Taxes. There may be instances where you may have to research the list for more than one territory/area.

16. Remember that the certification report includes personally identifiable information (PII) so you must use secure messaging when you email the information or the report to other IRS employees and partners.

17. You can provide the information to partners by phone, fax, secure email, or postal mail. You can email this data to partners using secure messaging. Please obtain the partners' consent prior to emailing.

18. See the reports available on the next page.

VITA/TCE Central Admin Search User Site BE

Reports

Search by report name

All | Assessments | Registrations | Users

Collection Catalog
Export of available Collections that includes course alignment.

Course Access

Course Activity

Course Catalog
Detailed export of the available course catalog.

Course Collection Activity Detail by Collection, By User — 1 report
Course Collections detail, including individual courses and completion status, per user for registered Collections.

Course Collection Progress by User
Percent of courses completed per Collection, by User. Includes Challenge results.

Course Evaluations Response Detail
Provides a detailed report of course Evaluation survey responses, by course, by user.

IRS Approved CE Report
List of users who are approved for CE. Users must have selected a credit type when registering for an exam, supplied a Professional status, passed the Advanced or a specialty exam, and be verified for CE.

IRS Pending CE Report
List of users who are pending CE approval. Users must have selected a credit type when registering for an exam, supplied a Professional status, and passed the Advanced or a specialty exam.

Missed Questions — 1 report
Incorrect assessment responses summary for the chosen course(s)

OPI Report
Detailed information about users who have registered for OPI.

Progress Report by User
Summary of course progress and logins by user name.

Survey Results
List of submitted Survey results.

User Accounts Detail
Table of all stored user account information.

Volunteer Report — 1 report
Detailed information about users who have registered for exams related to the Volunteer Agreement.

YouTube
IRS videos
IRS videos in American Sign Language(ASL)
IRS Videos Multilingual
Taxpayer Advocate Service

Facebook
Internal Revenue Service Tax Professionals
Taxpayer Advocate

Twitter
IRS News
Tax Professionals
IRS en Español
IRS Recruitment
Taxpayer Advocate

Help center
Quick Links and Resources
Email us

VITA/TCE Central

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