

Using the Exceed LMS Training Platform

Exceed is the Learning Management System (LMS) that we use for volunteer training. This is the platform you'll use to complete the online portion of your volunteer training, including taking all the required certification tests.

Step 1: Access Exceed LMS

If you haven't already made a VolunteerHub account, you'll want to do that first. You can find instructions on how to create a VolunteerHub account on our [Volunteer Resources page](#). VolunteerHub is the online schedule management platform that you will use to sign up for training and volunteer sessions. Once you have a VolunteerHub account, you can access Exceed LMS by visiting www.goladderup.exceedlms.com.

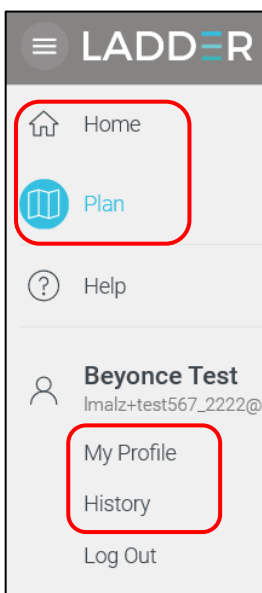
Step 2: Login or Create an Account

Returning Volunteers: If you already have an Exceed LMS account from a previous year, log in with that username and password. Remember: If you've forgotten your password, you can click "forgot password" to reset it, or reach out to volunteer@goladderup.org for assistance.

New Volunteers: If you don't have an Exceed LMS account, you can create a new one by clicking on "Sign Up Here." Select a username and password to use (we'd recommend using the same username and password as you did for VolunteerHub - keep it simple!). Input your information and select "TAP volunteer" as your role. Then just click "Register!"

Step 3: Basic Navigation in Exceed LMS

Once you've logged into Exceed LMS, you'll see the main home page. You'll also find a navigation menu on the left side.



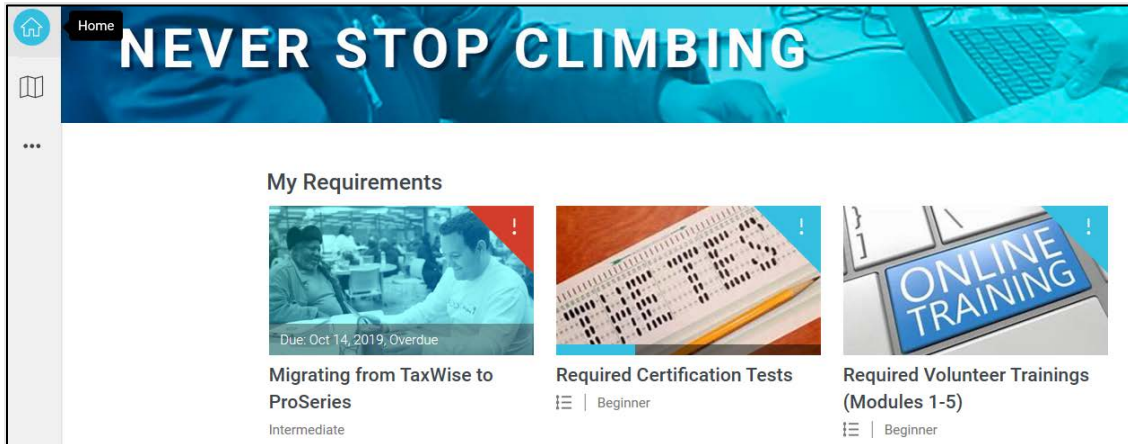
Home: Selecting this option will always take you back to the main Exceed LMS home page.

Plan: This is the page where trainings will be listed.

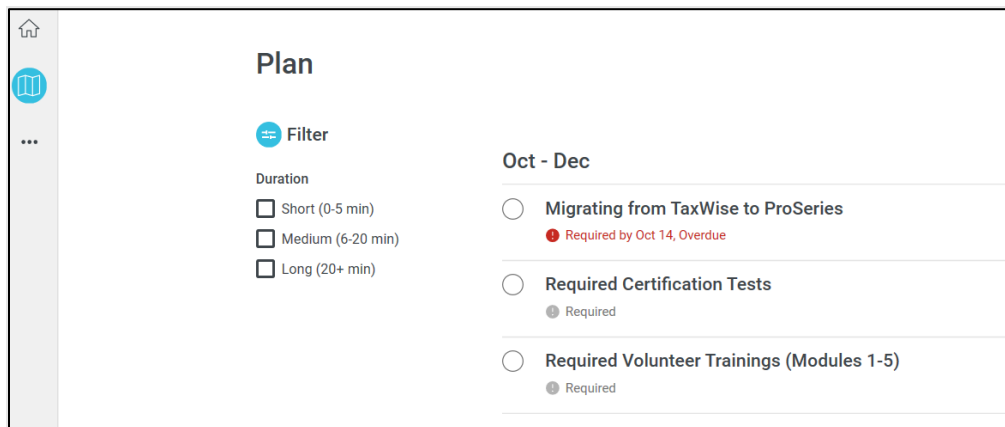
My Profile: Make any necessary changes to your profile here, including changing your password or updating your contact information.

History: This page will allow you to see what online trainings you have already completed. You can also filter by status of training (i.e., passed, failed, started).

Use “Home” to launch your required and optional courses:



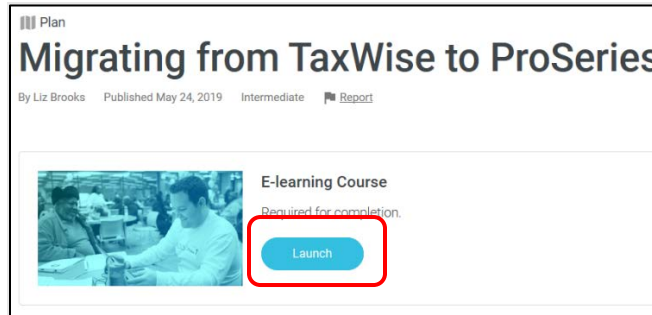
Instead of Home, you can also see all your courses by clicking on “Plan” in the left navigation menu to see all courses in your plan (required and recommended). To open a training, just click on the name of the training (ex: Required Certification Tests: Tax Preparer or Reviewer)



Some of the courses are standalone (single section), and others exist as paths. Standalone courses include:

- Optional: Using ProSeries Tax Software
- Quality Reviewer Training

For a standalone course, you will simply need to click the “Launch” button to enter into the course.

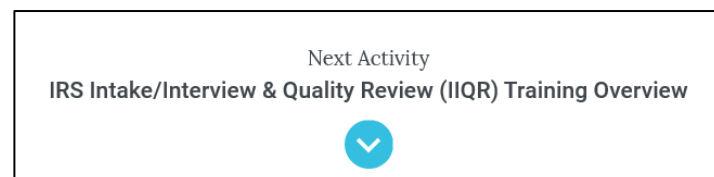
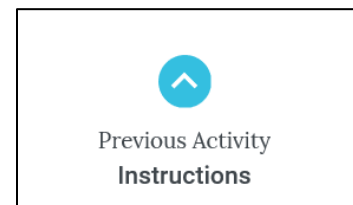
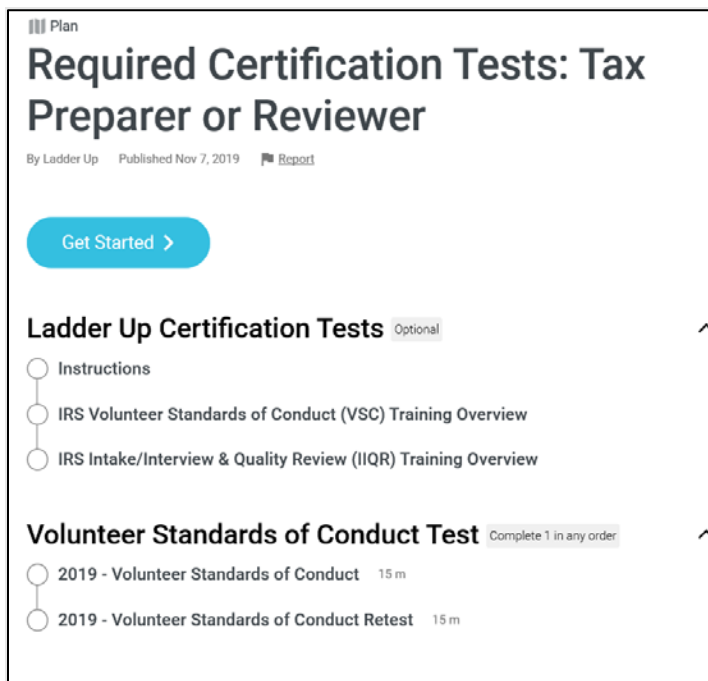


Once the section has been launched, click “Start Course” to begin.



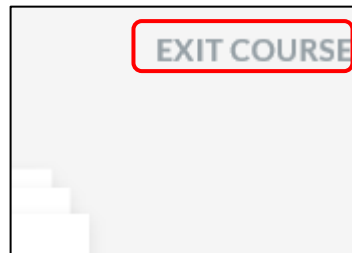
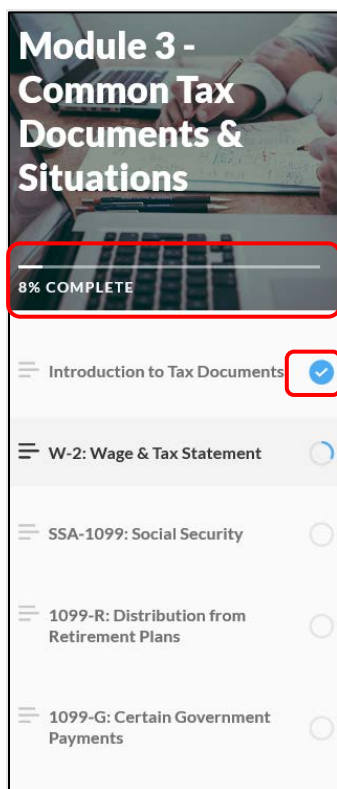
Path courses include more than one section, such as the *Required Volunteer Trainings (Modules 1-5)* and *Required Certification Tests*. For these courses you can choose to follow the pathway by clicking “Get Started.”

You can navigate between sections of a path course in Exceed LMS, by using the “Previous Activity” and “Next Activity” buttons.



Within a path, you will need to click the “**Launch**” button to enter the course, same as within a standalone course.

While working through a module, please use the menu on the left-hand side to navigate through the sections. A blue **checkmark** will appear next to sections of the training as you complete them, and a progress bar that will show you your progress. You can continue through the course by scrolling down using your mouse, or by clicking the blue “**Continue**” bar that appears when you have reached the end of a section. At the top right-hand-side of the module there is a button for “**Exit Course**” in case you wish to return to the Exceed LMS Path.



At the end of each of the online training module, there is a knowledge check to give you a chance to test your knowledge. If you miss any of the Knowledge Check questions, please review the module again to get familiar with all of the details as this information will benefit you at a tax site.

Questions? Email volunteer@goladderup.org