Step-by-Step to Free File Certification

Record Your Login Names and Passwords Below

Link and Learn Account:

Login Name: _____ Password: _____

Practice Lab:

Password to enter Practice Lab: TRAINPROWEB

Login Name: _____ Password: _____

Security Question: _____

TaxSlayer:

Location: _____

Login Name: _____ Password: _____

Location: _____

Login Name: _____ Password: _____

Location: _____

Login Name: _____ Password: _____

Location: _____

Login Name: _____ Password: _____

Free File Tax Preparer

Free File Tax Preparers provide a valuable service to the taxpayer. Tax preparers can provide basic education and assistance to the taxpayer. Thank you for your help!

Tax preparers are required to pass a tax law certificate in addition to the 2 basic certifications all volunteers are required to pass.

This guide will take you through the process step by step. The following are required to volunteer as a Free File Tax Preparer:

Step 1: Create a Link & Learn Account

- Visit https://linklearntaxescertification.com. Create a new IRS account. Follow the tips below.
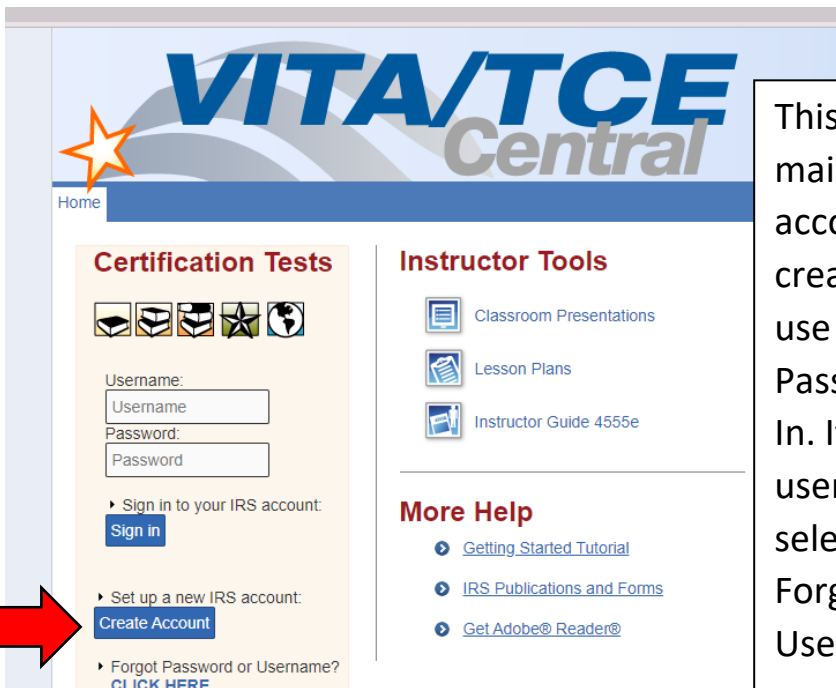
This is a screenshot of the main Link and Learn account page. After you create an account, you'll use the Username and Password section to Sign In. If you forget your username or password, select "CLICK HERE" under Forgot Password or Username? to retrieve it.

Tips:
Your Group: 01-VITA Volunteer
Partner/Organization Name: United Way of Pickens County
Do you want to take the Site Coordinator certification? Unless you plan to be a Site Coordinator and have talked to Nicole about this, it is not necessary.
Do you plan to volunteer in the VITA/TCE Program? Yes! Free File falls under the federal VITA program.
Training Source: Link and Learn Taxes (e-learning)

For those sections that do not have a red star, you do not need to complete the field. For example, if you do not have a PTIN Number, CTEC Number, or a need for continuing education credits, leave those sections blank.

Step 2: Volunteer Standards of Conduct (VSC) Exam

- The exam questions are found in the Publication 6744 (pages 11-14). You can get a paper version from Nicole or an electronic version here: https://www.irs.gov/pub/irs-pdf/f6744.pdf
- The answers are found in the Volunteer Standards of Conduct (VSC) Training in Publication 4961. You can get a paper version from Nicole or find the material here: https://www.irs.gov/pub/irs-pdf/p4961.pdf (pages 2-21).
- Sign in to Link and Learn using the Username and Password on the left side of the screen. https://linklearntaxescertification.com. Click on the Volunteer Standards of Conduct Exam and answer the questions.
- Minimum Proficiency Requirement is 80% or 8 out of 10 correct answers. Exam may be retaken using retest for an initial Score of 79% or less.
- Estimated completion time for exam is 1 hour.

Step 3: Intake/Interview and Quality Review Exam

- The exam questions are found in the Publication 6744 on (pages 23-24). You can get a paper version from Nicole or an electronic version here: https://www.irs.gov/pub/irs-pdf/f6744.pdf
- The answers are found in the Intake Interview and Quality Review Processes in Publication 4961. You can get a paper version from Nicole or find the material here at https://www.irs.gov/pub/irs-pdf/p4961.pdf (pages 22-28).
- For additional information see Publication 5101 – Intake/Interview & Quality Review Training at https://www.irs.gov/pub/irs-pdf/p5101.pdf
- Sign in to Link and Learn using the Username and Password on the left side of the screen. https://linklearntaxescertification.com. Click on the Intake/Interview and Quality Review Exam and answer the questions.
- Minimum Proficiency Requirement is 80% or 8 out of 10 correct answers. Exam may be retaken using retest for an initial Score of 79% or less.
- Estimated completion time for exam is 20 minutes.

Step 4: Basic OR Advanced Tax Certification

- *Please Note: You don't need both! If you are going for Advanced (highly recommended), skip Basic. <u>These are both challenging.</u> They are created to provide you with every odd scenario that could come to you. Please remember that the average taxpayer has a very simple return. AND you are not alone. There will be plenty of help and support on site for you. You don't need to know everything.*

<u>Create a Practice Lab Account</u> – you will need a Practice Lab account to complete portions of the Basic or Advanced exams.

- Visit https://vita.taxslayerpro.com/IRSTraining (password TRAINPROWEB)

- Click Create Account
- Fill out all information to create an account.
  - Select "VITA" under program type.
  - Leave SIDN blank
  - After filling out fields select "Create Account"
  - Then sign in again using new Username and Password
  - Write down your username and password for future use
- The exam questions are found in the Publication 6744 on (pages 29-57 Basic) and (pages 68-102 Advanced) https://www.irs.gov/pub/irs-pdf/f6744.pdf.
- Answers are found by using Pub 4012. You can get a paper version from Nicole or find the material here: https://irs.gov/pub/irs-pdf/p4012.pdf . Find additional assistance using Publication 4491: https://irs.gov/pub/irs-pdf/p4491.pdf.
- The second half of the test will prompt you to use your Practice Lab log in to complete the questions. Log in to your practice lab to practice creating tax returns.
- Use the study guides and check your answers at https://vitaresources.net.

Ready to Take the Basic or Advanced Exam?

- Sign in to Link and Learn using the Username and Password on the left side of the screen. https://linklearntaxescertification.com. Click on the Basic Exam or Advanced Exam and answer the questions.
- Minimum Proficiency Requirement is 80% or 28 out of 35 correct answers. Exam may be retaken using retest for an initial Score of 79% or less.
- Estimated completion time for exam is 4 hours
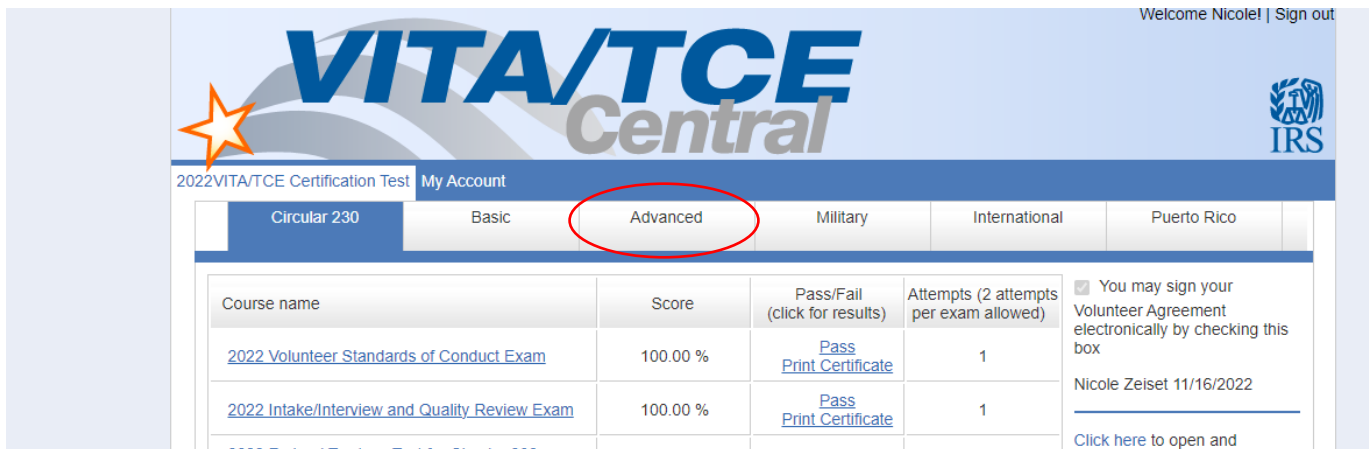
Step 5: Submit Signed Volunteer Agreement

- Sign in to Link and Learn using the Username and Password on the left side of the screen. https://linklearntaxescertification.com.
- On the right side of the screen, you'll see a check box prompting you to sign your Volunteer Agreement electronically by checking this box.
- After checking the box, select the blue "Click here" link underneath to open and complete your Volunteer Agreement for your records.
- A PDF will appear in the bottom left-hand side of your screen. Click to open.
- You need to submit this agreement to United Way of Pickens County. You can either download and email it to Nicole at nzeiset@uwpickens.org or you can print it and turn it in in person