



Step-by-Step to Free File Certification UNITED WAY OF PICKENS COUNTY **FREE FILE**

Record Your Login Names and Passwords Below

Link and Learn Account:

Login Name: _____ Password: _____

Free File Intake Coordinator

Free File Intake Coordinators often have the first interaction with the taxpayer. Intake Coordinators are helpful, kind, and provide basic direction. Thank you for your help!

Intake Coordinators are required to pass 2 basic certifications through the IRS pertaining to conduct and the overall process the taxpayer will go through from start to finish. This guide will take you through the process step by step. The following are required to volunteer as a Free File Intake Coordinator:

Step 1: Create a Link & Learn Account

- Visit <https://linklearntaxescertification.com>. Create a new IRS account. Follow the tips below.

The screenshot shows the VITA/TCE Central website. The main navigation bar includes a 'Home' link. The 'Certification Tests' section contains a 'Sign in' button and a 'Create Account' button, with a red arrow pointing to the 'Create Account' button. The 'Instructor Tools' section lists 'Classroom Presentations', 'Lesson Plans', and 'Instructor Guide 4555e'. The 'More Help' section lists 'Getting Started Tutorial', 'IRS Publications and Forms', and 'Get Adobe® Reader®'.

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 Pub 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.

Welcome Nicole! | Sign out

VITA/TCE Central IRS

2022VITA/TCE Certification Test My Account

Circular 230	Basic	Advanced	Military	International	Puerto Rico
Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	<input checked="" type="checkbox"/> You may sign your Volunteer Agreement electronically by checking this box Nicole Zeiset 11/16/2022 Click here to open and complete your Volunteer Agreement. Click Print from the file menu to print the page. Save the Volunteer Agreement	
2022 Volunteer Standards of Conduct Exam	100.00 %	Pass Print Certificate	1		
2022 Intake/Interview and Quality Review Exam	100.00 %	Pass Print Certificate	1		
2022 Federal Tax Law Test for Circular 230 Professionals			0		

Step 3: Intake/Interview and Quality Review Exam

- The exam questions are found in the Pub 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 Pub 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: 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.

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	<input checked="" type="checkbox"/> You may sign your Volunteer Agreement electronically by checking this box
2018 Volunteer Standards of Conduct Exam	100.00 %	Pass Print Certificate	1	Mary Meador 11/16 Click here to open and complete your Volunteer Agreement. Click Print to print the agreement.
2018 Intake/Interview and Quality Review Exam	100.00 %	Pass Print Certificate	1	
2018 Site Coordinator Training	Complete	Print Certificate	N/A	