



# 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: \_\_\_\_\_

## 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 Site Coordinator

Free File Site Coordinators manage the tax site. Site Coordinators quality review all tax returns and assist other volunteers as needed. Thank you for your help!

Site Coordinators are required to pass a tax law certificate and Site Coordinator exam 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 be a Site Coordinator:

### **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?** Yes!

**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.

Welcome Nicole! | Sign out

# VITA/TCE Central

2022 VITA/TCE Certification Test My Account

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)
<a href="#">2022 Volunteer Standards of Conduct Exam</a>	100.00 %	<a href="#">Pass</a> <a href="#">Print Certificate</a>	1
<a href="#">2022 Intake/Interview and Quality Review Exam</a>	100.00 %	<a href="#">Pass</a> <a href="#">Print Certificate</a>	1
<a href="#">2022 Federal Tax Law Test for Circular 230 Professionals</a>			0

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

## 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.

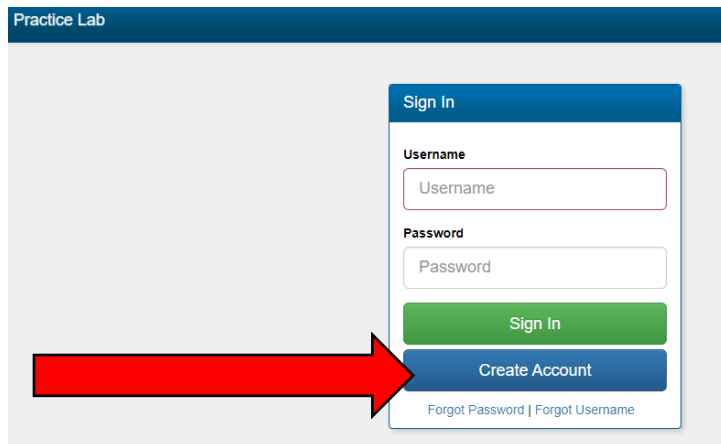


## Step 4: Advanced Tax Certification

- **Please Note This is a challenging exam. It is 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.**

**Create a Practice Lab Account** – you will need a Practice Lab account to complete portions of the Advanced exams.

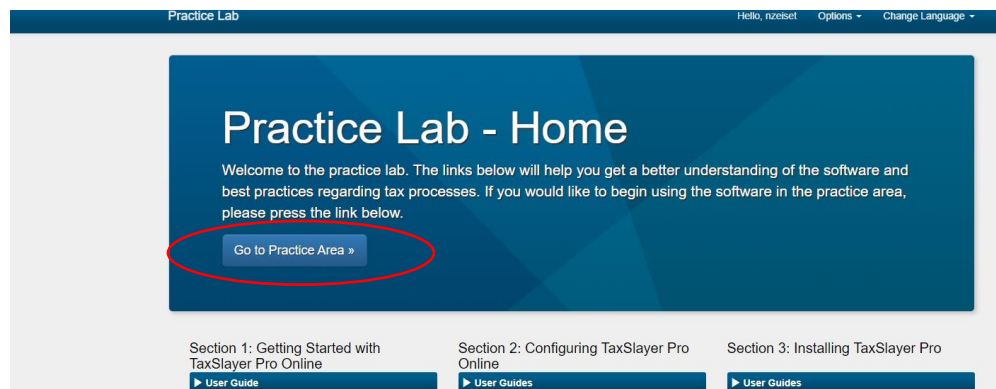
- Visit <https://vita.taxslayerpro.com/IRSTraining> (password TRAINPROWEB)



- 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 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 Advanced Exam and answer the questions.



UNITED WAY OF PICKENS COUNTY  
**FREE FILE**

- 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

Welcome Nicole! | Sign out

# VITA/TCE Central

2022 VITA/TCE Certification Test My Account

Circular 230	Basic	<b>Advanced</b>	Military	International	Puerto Rico
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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
		Pass		

### **Step 5: Site Coordinator Certification**

- The exam questions are found in the Publication 6744 on (pages 23-25). 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 <https://www.irs.gov/pub/irs-pdf/p5088.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 Site Coordinator Exam and answer the questions.
- Minimum Proficiency Requirement is 80% or 12 out of 15 correct answers. Exam may be retaken using retest for an initial Score of 79% or less.
- Estimated completion time for exam is 2 hours.

### **Step 6: 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](mailto:nzeiset@uwpickens.org) or you can print it and turn it in in person

2018 VITA/TCE Certification Test My Account

Circular 230	Basic	<b>Advanced</b>	Military	International	Puerto R
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Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	<input checked="" type="checkbox"/> You may sign y Volunteer Agreee electronically by ch box
<a href="#">2018 Volunteer Standards of Conduct Exam</a>	100.00 %	Pass <a href="#">Print Certificate</a>	1	Mary Meador 11/16  <a href="#">Click here to open : complete your Volu Agreement. Click P</a>
<a href="#">2018 Intake/Interview and Quality Review Exam</a>	100.00 %	Pass <a href="#">Print Certificate</a>	1	
<a href="#">2018 Site Coordinator Training</a>	Complete	<a href="#">Print Certificate</a>	N/A	