

NTTC Modified Pub 4012 TY20 Release 1 Notes

THIS RELEASE IS NOT MEANT TO BE PRINTED

The tax year 2020 NTTC Modified Pub 4012 Release 1 is based on the IRS Pub 4012 *Volunteer Resource Guide* with Tax-Aide additions to provide every Counselor a resource tool to use when preparing tax returns.

The additional material includes:

- Scope and policy items that differ from the VITA/TCE standards incorporated in the IRS publications.
- Step by step walkthroughs of items that may not be frequently encountered
- Hints and reminders intended to aid in return preparation and prevent common errors

Added material is in red except for inserted pages that have RED page numbers with standard black page text. Page numbers of inserted pages are X-#.1 or .2. Plus, all Index pages and Tab O Navigation Tables are inserts.

This version is based on the IRS October 2020 Edition. The print version of the IRS version will be available early November. We are in the process of preparing a PDF file of the Tax-Aide corrections and additions that can be inserted into the printed copy. The insert print set will not have all the features and content of the E-file version but will contain all scope differences.

The National Tax Training Committee recommends Counselors use this e-version. We have strived to make it easier to use by incorporating more links. For example:

- The front cover contains links to aid the Counselor
- Each Table of Content line is linked to its respective tab and page
- Scope of Service with Tax-Aide Scope Notes for 2020 (Page 5) has incorporated the Tax-Aide scope for 2020 Tax Returns only. Refer to the Portal Scope Manual for prior years scope.
- We have added both internal and external links throughout the file. If you see a light blue line under text or number, click on it and see where you go.
- Each Tab O Navigation Table entry includes links
- Each Index item is linked to page(s) listed.

New this year:

- We have placed a Link on the front cover that will take you to an Updates and

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Errata file containing corrections or new information that is not contained in this file.

- A link to this Read Me file is also new on the front cover.
- Added new links throughout the document to more comprehensive NTTC Training Materials. One example is the NTTC Schedule C Guidelines that contains additional help for returns containing one or more Schedule C forms.
- A link to a list of the NTTC Resources Available by Direct Link is on the front cover. This lists all the resource that are available for viewing directly from the list or links placed in the appropriate location in the document.
- NTTC is producing a video to help Counselors learn how to use this online file. We expect the video to be available about November 10th. We will revise this file with a link directly to the video. It will also be available through the Portal.

Release 2 timeline.

We expect Release 2 to be issued in January after IRS publishes Pub 4491X. The Number of changes in the 4491X will affect how long after its release we will finish Release 2. We expect a significant number of changes. Please use the Update link on the front cover to advise yourself of the late changes until then. Release 1 will not be the document you will be using at the start of the season. Release 2 will be the document to use at your site.

If you have any comments, suggestions, or questions that your local support team cannot answer, please *Submit a Request* via the Portal.