

District 5 Returning Counselor Training Plan - 2020

■ Who?

- District 5 Returning Counselors
 - Counselors, LC's
 - Approximately 90
- Client Facilitators Plan
 - LC's will coach (standard)
- Virtual Return Coordinators
 - New Training TBA (January)

■ How?

■ VIRTUAL WORLD TRAINING

— Google Meet

- Pre-Training Orientation
- January – 2 days – 2 sessions/day – 2 hours each

— Google Classroom

- Collection of Resources
- Classroom link will be provided
- Gmail account is required

■ What?

■ Core Returning Counselor Content

—AZ Certification

- Link & Learn – IRS Certification
- AARP Portal – Required AARP Training
- NTTC Exercises – 4 in NTTC and 2 New Tax Law (not in NTTC)

—Scope Changes

—Policy & Procedures (AARP portal)

—Federal Tax Law Changes

—Arizona Tax Law Plan

—TaxSlayer

■ Google Meet

- Videos - AARP video on YouTube
- Materials – aztax-aide.org
- Discussion – Live Sessions with Instructor
- Practice – NTTC Exercises

■ Google Classroom

- Videos in AARP Portal – Training & Tax Law folder
- Link to the Classroom – will be provided
- Demo of the Classroom
 - Assignments, Due Dates, Resource links, Knowledge Check
- Practice

■ Scope

- In scope for TY2020
- Not in scope for TY2020
- Stay in Scope
 - Especially in remote preparation
 - Eliminates personal risk – Volunteer Act

■ AARP Portal Training

- AARP Portal
 - Everyone needs to log in
 - Training Tab
- Required Counselor Training – 3 Courses
 - Policy & Procedures
 - Technology & Security
 - Security Essentials

■ Federal Tax Law

- CARES Act
- SECURE Act
- Families First Act
- Other Tax Law Changes

■ Arizona Tax Law

- AZ Reference Guide
- AZ Supplemental Intake form
- Pension Exclusions
- Property Tax Credit
- Other Tax Credits

■ Proficiency Exercises

- Anderson -
 - MFJ, Seniors, Taxable SS, Self Employed, CARES Act
- Emerson –
 - Qualifying widower, Survivor Pension – simplified, Capital Loss
- King –
 - W-2, Unemployment, Marketplace, CARES Act, HSA
- Parsons –
 - Joint pension, Self Employed W/insurance adj, Broker Stmt, Home sale, CARES Act
- New Tax Law Exercises
 - Polite & Garcia

■ AZ Tax Aide website



Arizona AARP Foundation Tax-Aide

Howdy, Volunteer AARP Tax-Aide



Menu

Training and TaxSlayer

Tools and information to be used in teaching and learning how to prepare tax returns by AZ Tax-Aide volunteers.

Assignments

TaxSlayer Training

1. [Accessing User Guides](#)
2. [Blog](#)
3. [Interest Entries](#)
4. [Practice Lab - Login](#)
5. [Practice Lab - Password Requirements](#)
6. [Practice Lab - Usage](#)
7. [Quick Manual](#)
8. [Support Link](#)

Privacy - Term

■ TaxSlayer Practice Lab

Practice Lab - Home

Welcome to the practice lab. The links below will help you get a better understanding of the best practices regarding tax processes. If you would like to begin using the practice lab, please press the link below.

[Go to Practice Area »](#)

Section 4: Preparing a Return

▶ [User Guides](#)

▶ [Starting a Tax Return](#)

▶ [Entering Basic Income Part 1](#)

▶ [Entering Basic Income Part 2](#)

▶ [Entering Adjusted Gross Income](#)

▶ [Entering Standard and Itemized Deductions](#)

▶ [Entering Basic Credits](#)

▶ [Entering Other Taxes](#)

▶ [Entering Refunds, Payments and Estimates](#)

■ Training

Questions...

Comments...

Practice...

