

Day 2 - Chat

Joel Levin

Does this Practice Lab link bring you to the same place as the Practice Lab link in the AZ Tax-Aide web site?

Yes

Brian Schoeffler

Where are the presentations for this training posted and will the videos from our training be posted...? links please

Judy Hogan

How do we access the UTube Channel to get direct access to videos without going thru portal?

The YouTube channel for Tax Aide is not publicly accessible. You must use the link to get to it. After you are on the link, you can copy it.

Patricia George

How often does the online 4012 get updated?

Only 2 or 3 updates during the tax season depending upon the amount and impact of tax changes

Harvey Roberts

Will we need a password to access Bogart Tools?

The Bogart website does not require a password.

DAYTON S.

Re Question 35: From the draft Instructions for 2441 (page 3): "For 2021, your credit for child and dependent care expenses is refundable if you, or your spouse if married filing jointly, had a principal place of abode in the United States for more than half of 2021. If [not], your credit for 2021 is nonrefundable and limited by the amount of your tax." The draft 2441 form shows refundable credit would go to Sch 3, line 13g and non-refundable credit would go to Sch 3, line 2.

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DAVID W.

POA specify for taxes?

Yes, a power of attorney must include financial transactions and taxes. Taxpayer representative must produce annually.

Joel Levin

Every year there's some form that does not print in a standard print set and I have to print it out of either the QR print set or another set.

You may set up a print set in TSO to include the forms you require.

JANE J.

Can we set the QR print set to show complete SS numbers?

Ted Manolas - QR print set does show full SSN and DOB. I just checked.

Joel Levin - In past TaxSlayer always showed all numbers on all forms. I think this is just for instructions.

We are not able to set what prints, only which forms print.

Joel Levin

I'm sure there's a minimum self-employed income above which you are required to file Schedule C

Diana Hodder - \$400

Joel Levin

Did the aarpfoundation.org (gmail) passwords get reset? The p/w stored in my browser isn't working.

Yes, after the September purge. Use your 9-digit Volunteer ID number.

Harvey Roberts

What you present is interesting but need a fuller description. Where to get this info?

There are Google Meet presentations in the Tax Law and Training folder of the AARP portal.

WILLIAM N.

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Have in person meeting dates been set?

Yes, 12/7 in Prescott, 12/10 in Tucson and 12/13 in Tempe. Al will send more information.

Ted Manolas

Ret Military is 100% of net pay, not 3500, as of 1231/2021

Patricia George

a5000*****z@aarpfoundation.org is the format for email

The Post September Purge format for your Chromebook account is your 9-digit Voluntary ID@aarpfoundation.org There is nothing before nor after your Vol ID.

JANE J.

Did you say the service delivery models is not yet available?

The Service Delivery models will be posted on the AZ website by next week.

Joseph Ohrazda

Who do we report LMS problems?

Volunteer issues with LMS should be reported to the Local Coordination, then District Coordinator. They should help resolve. If not resolved, then notify the State Coordinator.

Cottonwood TaxAide

Where are we at with the additional Chromebooks

Chromebooks are available. Send requests for equipment to James Graff.

JANE J.

Where do we find the PDFs for the courses.?

In the LMS folder in the library in the portal.

Diana Hodder

Will we have to print the entire PDF?

PDF's are readable on a computer.

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Patricia George

Where do you get the LMS report again?

There will be a new LMS report in the portal - Reports

Cottonwood TaxAide

If a vol doesn't have a computer, how do you NOT print it

Provide a Chromebook or use Google Meet to review with volunteers.

DAVID W.

Is there a consolidated LMS report for the courses required?

Not yet, it is being developed.

Harvey Roberts

AZ Amendment for only UCE. Where can we get this PPT?

All presentations will be posted on the AZ website.

Alicia Gutzman

FROM 140X instructions: Which forms must be included with my amended return, when filed? You must include any form that is changed or was not included with your original tax return. Do not include a copy of your original tax return or a copy of the federal tax return.

JANELLE R.

If you amend an AZ return with credits on the original, attach the credit forms to avoid having the credits removed

Diana Hodder

When will there be training or information on how to scan taxpayer documents into TaxSlayer?

Training will be provided for sites selecting a scan model.

Harvey Roberts

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Last year there was a matrix concerning the Covid status and the AARP allowed prep model. Is there an equivalent for TY2021?

Yes, it is not ready yet.

Diana Hodder

How do other sites handle the AZ Supplement, such as do you print 500 copies? have a laminated copy that people look at and say if any answers apply? Other?

Print a few for the site. You can laminate and reuse.

Cottonwood TaxAide

Where are we at with the additional Chromebooks

Chromebooks are available for volunteers working with tax returns. Please tell James Graff know how many you need.

Diana Hodder

Is everyone supposed to attend the upcoming meetings?

There is a 20-person maximum for in person meetings. The emphasis will be for Training, not operations, so we would like Instructors to attend if possible.