

NTTC Training Videos

Revised 1/10/2022

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Training Videos Revised 1/10/2022

***Newly added or replaced videos or information since 12/18/2021 release

&& Additional information since 12/18/2021 release

	Video Link	Description	Audience	Time (min.)	Version Date	PowerPoint Only Link
Tax Law & Preparation						
New Tax Law 2021						
	New Tax Law DAntonio and Elder ***	TSO data entry of New Tax Law for Workbook D'Antonio and Elder cases	Counselors	15	1/4/2022	NTL DAntonio and Elder PPT
	New Tax Law Parata ***	TSO data entry of New Tax Law for Workbook Parata case	Counselors	14	1/4/2022	NTL Parata PPT
	New Tax Law 2021 playlist &&	Playlist of 2021 new tax law videos	Counselors			
	New Tax Law Highlights	Highlights the significant tax law changes, in particular big money items and tax benefits that impact the senior population.	Counselors	17	10/31/2021	New Tax Law Highlights PPT
	Tax Law Changes	Recorded session with detailed, step-by-step description of the Tax Law Changes slides.	Counselors	54	9/18/2021	Tax Law Changes PPT
	Deductions Adjustments Credits	2020 and 2021 changes	Counselors	9	8/17/2021	NTL Deductions Adj Cr PPT

	Video Link	Description	Audience	Time (min.)	Version Date	PowerPoint Only Link
	Economic Impact Payments &&	2020 and 2021 changes	Counselors	13	8/9/2021	EIP PPT
	New Forms 1099 NEC & 1040	2020 and 2021 changes	Counselors	4	8/16/2021	New Forms PPT
	Schedule C	2020 and 2021 changes	Counselors	10	10/11/2021	NTL Schedule C PPT
	Education Changes	2020 and 2021 changes	Counselors	7	10/19/2021	NTL Education PPT
	Child Tax Credit	2021 changes	Counselors	13	10/19/2021	NTL Child Tax Credit PPT
	Tax Law Updates	TaxSlayer Enhancements Webinar; includes location of changes in TaxSlayer	Counselors	34	12/8/2021	
	E-filing changes	TaxSlayer Enhancements Webinar; new e-filing data entry	Counselors	10	12/8/2021	

&& Guidance has changed on reporting the EIP. The Form 1040 instructions tell taxpayers to report the EIP (stimulus payments) that they (or their spouse, if filing MFJ) received directly, as reported on letter 6475. MFJ taxpayers will receive 2 letters, one for each spouse. Each letter will list half the amount of EIP received. The amounts on both letters need to be added to arrive at the total EIP that should be entered into TaxSlayer.

Do not include payments sent directly to others, even if the other person is now a dependent of the taxpayer. Ask taxpayers to bring letter 6475 so that this can be reported accurately.

In the Langford example, Gloria should therefore report only the \$1,400 sent directly to her.

New Tax Law 2020						
	New Tax Law 2020 playlist	Playlist for 2020 new tax law videos	Counselors			
	Form 8915-E Retirement Distributions	Demo of entry for Polite case	Counselors	13	3/3/2021	Garcia and Polite Fact Patterns
	New Tax Law 2020 in TaxSlayer and Sch C	Demo of entry for Garcia case	Counselors	21	1/6/2021	Garcia and Polite Fact Patterns
	IRA Changes	IRA changes for 2020	Counselors	10	8/21/2020	
Basic Information						
	Intake Screening	Situations you may encounter during the intake	All	6	9/13/2021	Intake Screening PPT
	Intro to Federal Income Tax Law	Taxation, Form 1040 and Schedules	Counselors	11	9/13/2021	Intro to Federal Income Tax Law PPT
Income						
	1099-R Basic Overview	Introduces 1099-R forms and demos in TaxSlayer	Counselors	9	8/12/2021	1099-R Basic Overview PPT
	1099-R Public Safety Officer	Explains retired PSO health insurance premium exclusion and demos in TaxSlayer	Experienced Counselors	9	9/6/2021	1099-R Public Safety Officer PPT
	1099-R Qualified Charitable Distributions	Explains qualified charitable distributions and demos in TaxSlayer	Experienced Counselors	11	9/6/2021	1099-R QCDs PPT
	1099-R Rollovers	Explains retirement account rollovers and demos in TaxSlayer	Experienced Counselors	12	9/19/2021	1099-R Rollovers PPT

	1099-R Early Distributions	Explains early distributions from retirement accounts, reviews penalty exceptions and demos in TaxSlayer	Experienced Counselors	14	9/21/2021	1099-R Early Distributions PPT
	1099-R Disability	Handling a pension with disability	Experienced Counselors	9	10/16/2021	1099-R Disability
	Distributions from IRA with basis	Explains and demos data entry for forms 8606 and 5498	Experienced Counselors	7	12/22/2020	
	Railroad Retirement Benefits	Railroad retirement pension plans, green and blue forms	Experienced Counselors	10	7/10/2021	Railroad Retirement Fact Pattern Railroad Retirement PPT
	Lump Sum Social Security Payment	Explains how to handle a lump sum SS payment	Experienced Counselors	9	8/17/2021	Lump Sum Soc Sec PPT
	Medicaid Waiver on W2	Medicaid Waiver payments paid on a W2	Experienced Counselors	17	9/25/20	MWP Paid on W2
Deductions/ Adjustments						
	Bogart Education Calculator	Determine and optimize education credits	Experienced Counselors	16	8/31/2020	Bogart Education Calculator
Health Savings Account (HSA)						
	HSA Full Year	Health Savings Account Contributions: Full Year; required for Test	Counselors	13	9/15/2020	HSA Full Year

	HSA Part Year	Health Savings Account Contributions: Part Year; Comprehensive topic	Experienced Counselors	15	9/15/2020	HSA Part Year
	HSA Married	Health Savings Account Contributions: Married; Comprehensive topic	Experienced Counselors	15	9/15/2020	HSA Married
	HSA Distributions	Health Savings Account Distributions; required for Test	Counselors	15	9/15/2020	HSA Distributions
Miscellaneous Topics	Amended Returns Part 1	Amendments for tax returns that were done at your site	Experienced Counselors	20	10/30/2020	
	Amended Returns Part 2	Amendments for tax returns when return is not available in TaxSlayer	Experienced Counselors	14	10/30/2020	
	State Tax Refund	When is a state refund taxable?	Counselors	14	9/21/2020	State Tax Refund
	Deceased Taxpayer	Explains how to handle deceased taxpayer in TaxSlayer	Counselors	14	8/9/2021	Deceased Taxpayer PPT
	Sale of Residence Part 1	Basics of handling taxpayer's sale of residence	Experienced Counselors	8	9/15/2021	Sale of Residence Part 1 PPT
	Sale of Residence Part 2	Comprehensive, less common topics with sale of residence	Experienced Counselors	9	9/16/2021	Sale of Residence Part 2 PPT

Examples and Exercises						
Evans-Bryant	Evans-Bryant Fact Pattern	Information from workbook				
	Intake and Interview		All	20	9/8/2020	Intake and Interview
	Demographics and Consents		All	6	9/27/2020	
	Basic Information		Counselors	10	9/20/2020	Basic Input
	Wages		Counselors	8	9/7/2020	Wages
	Interest and Dividends		Counselors	4	9/4/2020	Interest and Dividends
	Pensions and Social Security		Counselors	13	9/13/2020	Pensions and Social Security
	IRAs		Counselors	5	9/18/2020	IRA Distributions
	Schedule A		Counselors	13	9/3/2021	Schedule A PPT
	Schedule C		Counselors	9	8/23/2021	Schedule C PPT
	Schedule E		Counselors	5	9/28/2020	Schedule E
	Education		Counselors	7	8/31/2020	Education
	Schedule D Brokerage Statements		Counselors	11	8/31/2020	Schedule D Brokerage Statements
	Schedule D Carryforward and Inherited		Counselors	6	8/31/2020	Schedule D Carry Forward
	Other Income		Counselors	7	9/4/2020	Other Income
	Adjustments		Counselors	5	9/4/2020	
	Childcare and Dependent Credits		Counselors	8	9/20/2020	Child and Dependent Care Credits
	Finishing the Return		Counselors	14	10/4/2020	Finishing The Return
Alvarado-Nogales						
	Alvarado Nogales Fact Pattern from 2021 Workbook					
	Alvarado Nogales Return Part 1		Counselors	13	8/19/2021	Alvarado Nogales Part 1 PPT
	Alvarado Nogales Return Part 2		Counselors	14	8/19/2021	Alvarado Nogales Part 2 PPT

Volunteer Resources						
	Certification Requirements	Describes process and requirements for certification for all volunteers	All	11	8/20/2021	Certification PPT
	Jeff Bogart's Toolbox	A walkthrough of the tax preparation tools made available by Jeff Bogart, a tax volunteer from Colorado	Counselors	12	9/9/2020	Jeff Bogart's Toolbox PPT
	NTTC Modified Pub 4012	Using NTTC Modified 4012 which is the electronic version of Volunteer Resource Guide	Counselors	16	11/7/2021	
	Scope Manual	Importance of Scope and how to search	Counselors	6	9/7/2020	
Instructor Resources						
Train the Trainer						
	Attitudes About Virtual Teaching	Make the change from Classroom to Virtual Training	Instructors	9	8/23/2020	
	Management and Setup	Management and Setup	Instructors	11	8/30/2020	
	Participation and Socializing	Getting students to participate and socialize virtually	Instructors	6	9/6/2020	
	Adult Learning Principles	General Training Principles	Instructors	9	8/23/2020	

	5 Step Model for Training Sessions	How to structure a training session for effective learning	Instructors	8	8/23/2020	
	TX Instructor Workshop	Excellent example of how training will work virtually	Instructors	33	10/18/2020	TX Instructor Workshop PPT
	All-in-One Exercise Demo	Recorded session. How and why you can use All-In-One Exercises in class	Instructors	11	11/17/2021	All-in-One Exercises PPT
	Training Slides	Recorded session. Changes to Training Slides that make them easier to use and how to use them	Instructors	15	11/17/2021	Training Slides PPT
Recording Instructional Videos						
	Reasons to Record	Creating Instructional Videos	Instructors	3	8/23/20	
	Making a PowerPoint Slide Show with Audio	Record a PowerPoint slide show with narration and slide timings	Instructors	2		
	Turn your PowerPoint presentation into a video	Create a PowerPoint video from your PowerPoint	Instructors	1		
Google Meet						
	Webinar Etiquette & Tips	Helpful Tips to Enhance Your Webinar	Instructors	3	8/3/2020	
	Using Google Meet	How to presentation	Instructors	12	9/15/2021	Using Google Meet PPT Using Google Meet Checklist

	Using Google Meet Demo	Recorded demo using Google Meet features	All	27	7/28/2021	
	Google Meet Setup	How to set up Google Meet and advantages of using your Foundation account	Instructors	8	11/28/2021	
	Google Meet Breakout Rooms	How to set up and use breakout rooms	Instructors	8	12/10/2021	
	Google Meet Phone Options	How to call in to a meeting, use Google Meet to place a call, and invite someone to call into the meeting	Instructors and Students	5	12/12/2021	
	Google Meet Participation Tools	How to use various features in Google Meet to enhance participation	Instructors	6	12/11/2021	
	Google Meet Communicating with the Deaf	Introduction to Video Relay Service for the Deaf	Instructors	2	12/12/2021	
	Choosing a Screen Recorder for Google Meet-Part 1	Advice on choosing a screen recorder, Flashback Express suggested	Instructors	9	8/30/2021	
	Recording and exporting google meets with Flashback Express-Part 2	Using flashback express to record a meeting	Instructors	19	8/30/2021	How to Record Google Meet Checklist
Google Forms						
	Basics of Google Forms	Creating google forms: part 1 of 3	Instructor and Student	15	10/16/2021	
	Google Forms Quizzes	Creating google forms: part 2 of 3	Instructor and Student	16	10/10/2021	

	Enhancing Appearance of Google Forms	Creating google forms: part 3 of 3	Instructor and Student	6	10/10/2021	
	Polls and Quizzes	Demo on using polls and quizzes with Google Forms	Instructors	6	9/19/2020	
	Google Forms for Orientations	Using Google Forms to Schedule Orientation meetings and limit number of participants	Instructor and Student	8	9/9/2020	
	Google Forms Branching Logic	How to send respondents to specific questions	Instructor and Student	13	10/11/2021	
	Google Forms Attach Files	How to attach files in responding to a google form	Instructor and student	10	11/13/2021	
	Google Forms Ownership Transfer	How to copy and transfer a form to another instructor	Instructor	5	10/23/2021	
	Google Forms Matching	How to create a quiz question where you match items to the correct answer	Instructor	9	11/24/2021	
Google Classroom	Student Advantages Google Classroom		Instructor and Student	3	10/8/2020	
	Instructor Advantages Google Classroom		Instructor and Student	5	10/8/2020	
	How to Use Google Classroom Training Videos		Instructor	3	10/15/2020	
	How to Create a Google Account and an		Instructor and Student	6	10/18/2020	

	aarpfoundation.org Google account					
	How to Create in a Personal Account a Google Classroom and Organizational Topics		Instructor	9	10/11/2020	
	How to Add Resources Materials to Google Classroom		Instructor	14	10/8/2020	
	How to Create Assignments Google Classroom		Instructor	11	10/8/2020	
	As an Instructor How to Review Submitted Assignments in Your Google Classroom		Instructor	7	10/11/2020	
	How to Create Google Meet Rooms		Instructor	12	10/9/2020	
	Suggestions for using Google Meet Rooms in Google Classroom		Instructor	10	10/9/2020	
	How to Add Co-Teachers and Students		Instructor and Student	7	11/29/2020	
	How to Transfer Ownership from One Teacher to Another in Google Classroom		Instructor	4	11/20/2020	
	Emailing in Google Classroom		Instructor	3	10/13/2020	
	How to Access Your Google Classroom on the AARP Foundation Chromebook as an Instructor		Instructor	2	10/13/2020	

	Student: How to Join Your Google Classroom and Enter Your Google Meet Room		Student	5	10/10/2020	
	Student: How to Submit Assignments in Your Google Classroom		Student	8	10/11/2020	
	Student How to Review Returned Assignments in Your Google Classroom		Student	5	10/11/2020	
	Student: How to Access Your Google Classroom on the AARP Foundation Chromebook		Student	2	10/13/2020	
Using TaxSlayer Customer Portal						
	Uploading Scan Files to TaxSlayer and Accessing Those Files for Return Prep and Quality Review			13	10/11/2021	
	Changing Preparer Name on a TaxSlayer Return			4	10/11/2021	
	TaxSlayer Customer Portal			25	10/11/2021	
	Customer Portal Changes	TaxSlayer Enhancements Webinar; demo of scanning and customer portal	Counselors	31	12/8/2021	