

Instructor Led Training Plan New & Returning Counselor 2022

■ What Resources are available?

- [NTTC Training Handbook](#)
- [NTTC Workbook](#) & [Instructors Guide](#)
- [NTTC Catalog](#)
- [NTTC Training Videos](#) – (27 +)
- NTTC Exercise Slides – [Andrews](#), [Baker](#), [Caldwell](#) & [Davenport](#)
- Pub 6744, [4012](#), 4491

■ Where are these Resources?

- AARP Volunteer Portal Libraries – Training & Tax Law – Training Resources
<https://secure.aarp.org/applications/user/login>



2022 TRS Webinars



All-In-One Lessons



Continuing Education Credits



Pub 4491 - NTTC Modified



Self Study



Training Materials



Training Slides



Training Videos



Workbook



NTTC Training Handbook 2022

■ Where are these Resources?

- AZ Tax-Aide website - Tax Preparation – Training and TaxSlayer
<https://aztax-aide.org/>

▼ Certifications and Testing

1. [Certification TY22](#)
2. [Certification TY22 \(slides\)](#)
3. [IRS Link & Learn Advanced Course](#)
4. [IRS Link & Learn Instructions](#)
5. [IRS Link & Learn Login](#)
6. [Pub 6744 – Volunteer’s Test/Retest](#)

▼ TaxSlayer Training

1. [Accessing User Guides \(slides\)](#)
2. [Blog](#)
3. [Changing TSO Admin](#)
4. [Interest Entries](#)
5. **[Practice Lab – Login](#)**
6. [Practice Lab – Password Requirements](#)
7. [Practice Lab – Usage TY22](#)
8. [Support Link](#)

■ Where are these Resources?

■ AZ Tax-Aide website - Tax Preparation – Training and TaxSlayer

▼ Training Manuals and Programs

1. [Certification TY22](#)
2. [Certification TY22 \(slides\)](#)
3. [Gold Standards for Intake & Interview TY22](#)
4. [Gold Standards for Quality Review TY22](#)
5. [NTTC Training Videos TY22](#)
6. [Pub 4012 r1 TY22](#)
7. [Pub 4491 TY22 — Training Guide](#)
8. [Pub 5101 TY22 — Quality Review](#)
9. [Pub 6744 Volunteer's Test TY22](#)
 - [Answer Sheet pp5-9 TY22](#)
 - [Volunteer Standards of Conduct pp11-16 TY22](#)
 - [Intake Interview & Quality Review pp19-22 TY22](#)
 - [Site Coordinator pp23-28 TY22](#)
 - [Advanced Scenarios 1 to 6 pp68-73 TY22](#)
 - [Advanced Scenario 7 pp74-82 TY22](#)
 - [Advanced Scenario 8 pp83-94 TY22](#)
 - [Advanced Scenario 9 pp95-102 TY22](#)
 - [Advanced Retest pp103-112 TY22](#)
10. [Self-Study Program TY22 NTTC](#)
11. [Tax-Aide Scope Manual TY22](#)
12. [Workbook Exercises NTTC TY22](#)

■ Where are these Resources?

- AZ Tax-Aide website - Tax Preparation – Training and TaxSlayer

▼ Training Slide Presentations

1. [AZ Tax Changes \(slides\) TY22](#)
2. [Federal Tax Law Changes \(slides\) TY22](#)
3. [Intro to TS Practice Lab \(slides\) TY22](#)
4. [Pub 5101 — Interview & QR \(slides\) TY22](#)

■ Where are these Resources?

■ AZ Tax-Aide website

- Tax Preparation – Training and TaxSlayer – **Instructors Only**

▼ Information for Instructors

1. [Instructor Guide NTTC TY22 v1](#)
2. [List of NTTC TinyURLs 2022-10-13 v2](#)
3. [Living Situations Quiz, 9 scenarios](#)
4. [New Volunteer Training Videos TY22](#)
5. [NTTC Enrichment Schedule TY22](#)
6. [Training Exercises Presentations TY22](#)
7. [Training Handbook NTTC TY22](#)
8. [Training Videos NTTC TY22](#)

▼ Instructional Presentations

1. [AZ PTC \(video\) TY20 – click to download](#)
2. [Education Benefits r1 TY21](#)
3. [Exploring Form 1099-R TY21](#)
4. [Exploring Investment Income TY21](#)
5. [Filing Status r1 TY21](#)
6. Training Exercises (slides) TY22
 - [Andrews Exercise \(slides\) TY22](#)
 - [Baker Exercise \(slides\) TY22](#)
 - [Caldwell Exercise \(slides\) TY22](#)
 - [Davenport Exercise \(slides\) TY22](#)
7. [Unique Filing Situations r1 TY21](#)

■ Where are these Resources?

■ AZ Tax-Aide website

- Tax Preparation – Training and TaxSlayer – **Instructors Only**

▶ Instructor's Meeting TY21

▼ Tools for Instructors

1. Forms Generator for MS Windows
[Forms Generator v20 \(download link\)](#)
[Forms Generator – Read Me v20](#)
[Forms Generator – Users Guide v20](#)
2. **Free, online, PDF converters**
[FreePDFconvert](#)
[PDF2Doc](#)

■ Instructor Led Training – New Volunteer

- **NTTC Workbook**
 - 4 Training Exercises – teach interview skills & core topics
 - PowerPoint slides are available for each exercise
 - Assign problems and give quizzes (available in NTTC Handbook)
 - Distribute answers (Ok in AZ)
- **NTTC Pub 4012-Modified**
 - Integrate Pub 4012 into each exercise to teach researching tax law, scope & TSO data entry
- **NTTC Pub 4491-Modified**
 - Use to learn tax law and to answer quizzes (Link & Learn)
- **Video Library**
 - Covers specific tax topics – use in class or assign to watch at home

■ Instructor Led Training – New Volunteer

- Arizona Tax
 - AZ “Cactus Book” (AZ 4012) – use to teach AZ specific TSO input
 - Introduce AZ Supplemental Intake Form and relation to TSO
 - PowerPoint available to guide through in class tax exercise
 - Assign AZ Tax Exercise and discuss results
- AARP Scope & Certification
 - Complete Scope & Certification Training
 - Demonstrate use of AARP Scope Manual
- Mentor
 - Assign mentors, establish “Office Hours”

■ Instructor Led Training – Returning Volunteer

- Certification Presentation
 - NTTC Workbook assigned exercises – distribute answers (OK)
- Service Delivery Models
 - Optional discussion of site-specific model changes for TY22
- Scope Presentation
 - Out of Scope – National, Region and Arizona
- TaxSlayer
 - Practice Lab – Educational Links
 - Production – Screen changes

■ Instructor Led Training – Returning Volunteer

- Federal Tax Law
 - New Law and Changes, Expired and Extended
- Arizona Tax Law
 - Cactus Book – how to use
 - Tax Credits, PTC and Charities, TSO screen changes
- Bogart
 - Calculators – Annuity, Filing Status, Education

■ Technology – New & Returning Counselors

■ Chromebook Training

- Log In, Connectivity, Secured Network, Recovery
- Main Browser, Add Links, Drive and Printer

■ Link & Learn

- Log In, My Account tab, Advanced tab, Pub 6744 & 4491

■ AARP Portal & AZ website

- Portal – Library – Tax Law & Training folder
- AZ website – Training tab

■ Lesson Plans

- Introduce Topic
- Demo TaxSlayer (PL) input from exercise Intake Form/Discussion
- Students – Hands on input to TaxSlayer (PL)
- Discussion (Q & A)
- Assign Homework
- TaxSlayer (PL) time with Mentors

Questions...

Comments...

Practice...

