

■ TRAINING DAY for Returning Counselors



They will arrive with ?'s

Our job is to provide the information they need to prepare and E-file an accurate Federal & State Tax Return

■ Introduction

- Welcome
 - Introductions
 - Mission
 - Distribute Handouts
 - RCT Plan – agenda
 - Evaluation
 - What do you wish to learn today?

■ Certification

- What do we need to do to get certified?
 - Discuss Handout
 - Certification_TY22.docx
 - Presentation
 - Certification_TY22.pptx, LMS_TY22.pptx
 - Q & A

Scope

- What changes have been made to AARP Scope?
 - Discuss Handout
 - C2467 – Summary of how can we help taxpayer today
 - Presentation
 - Scope_TY22.pptx
 - Q & A with Scope Manual
 - Discuss Out of State returns, STAP, Friends and Family

■ Federal Tax Law Changes

■ What Federal tax law changes will we need to know?

— Handouts

- [Schedule C Guidelines_TY22.pdf](#), [Schedule C Worksheet.pdf](#)
- [Schedule C.docx](#) (includes Parada exercise)

— Presentation

- [Federal Tax Law Changes_TY22.pptx](#)
- [Schedule C Training.pptx](#)

— Q & A

■ Arizona Tax Law Changes

- What Arizona tax law changes will we need to know?
 - Handouts
 - Supplemental AZ Intake Form.pdf
 - Exercises (your choice of 6 AZ exercises)
 - Presentation
 - Arizona Tax Law Changes_TY22.pptx
 - Cactus Book – Demo (TBD)
 - Q & A and Assign AZ Knowledge Check (2 choices)

■ Time to discuss Site Operations

- How are we going to do taxes this year?
 - Local or Shift Coordinator
 - Discuss specific Tax-Aide site operations plan
 - In Person, Drop Off, Scanning
 - Appointments, Walk Ins, Other items
 - Presentation
 - COVID Site Protocols_TY22.pptx
 - Q & A

■ Live Demo

■ Taxslayer Demo

- Log into TSO – Practice Lab
- Demo
 - TRAINPROWEB & User Log in process (Forgot Username or Password)
 - Locate and demo Brainshark video's
 - Go to Practice Area
 - Demo Change Tax Year, Client Search, Start New 2022 Tax Return
 - Q & A

■ Live Demo

■ Bogart Demo

- Where to find **Bogart URL**
- Demo
 - Annuity/Pension Calculator
 - Dependent Qualification Calculator
 - Education Benefits Calculator (optional for some sites)
 - Other (based on Tax-Aide site need)

■ Live Demo

■ AZ Website Demo

- Where to find www.aztax.aide.org URL – Login process
- Demo
 - Website Search feature
 - Tax Preparation Drop Down (show choices in each area)
 - Arizona Tab, Chromebook Tab, Tools & Info
 - Training & TaxSlayer Tab (show each of the 4 subgroups)
 - Q & A

■ Live Demo

■ Chromebook Demo

- Start Up Process
 - Handout **Startup** Instructions, **Account Recovery** instructions
- Demo*
 - Remove User, Creating recovery account information
 - Network connection, adding a printer
 - Tax-Aide Browser Links, Adding AZ Tax-Aide & AZ DOR URLs to browser
 - Other (based on users' questions)

* It may be useful to have the District TC available for Chromebook questions

■ Returning Counselor Training

They arrived with



And left Uplifted

