

Arizona New Counselor Training Plan – TY23

1. Welcome
 - a. AARP Tax-Aide Mission – [Training Plan_TY23](#)
 - b. [Welcome Video](#)
 - c. [NTTC Training Resource Links](#)
2. Certification – [Certification TY23.docx](#); [Certification TY23.pptx](#)
 - a. IRS -
 - i. Link & Learn – [Create Account, Advanced Tab](#) [AZ Website](#)
 - ii. [Pub 6744](#) – [Test/Retest Book](#)
 - iii. Volunteer Agreement - 13615
 - iv. TaxSlayer – Practice Lab
 - b. AARP Training
 - i. LMS – required training determined by assignment.
 - c. Arizona Training
 - i. NTTC workbook – 4 required exercises
 - ii. State Tax Training
3. TaxSlayer – Practice Lab
 - a. [Practice Lab Log in](#)
 - b. Educational Materials
 - i. Section 4 – Preparing a Return
 - c. Go To Practice Area
 - i. Start New 2023 Return
 - ii. Client List
 - iii. Change Tax Year
 - d. Social Security Number Input
 - i. [Use of Intake Booklet](#)
 - ii. [Taxpayer Interview](#)
 - iii. Practice Lab – SS Numbers – XXX -00-XXXX (ask Instructor)
 - e. Filing Status –
 - i. [NTTC Tool](#)
 - ii. [Colorado Resource Toolbox](#)
 - f. Personal Information –
 - i. Use * to identify Required Input
 - ii. Use CAPITAL letters.
 - iii. Rules for entering Names.
 - iv. DOB
 - v. Input Basic Information
 - vi. Address’s different on Forms
 - vii. Resident State as of 12/31/23
 - viii. Phone -required.
 - ix. Email - optional
 - g. Dependents
 - i. [Qualifying Child or Relative Tool](#)
 - ii. [Colorado Resource Toolbox](#)

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- h. Income
 - i. [W-2 Wages](#)
 - ii. [1099-G State Refunds](#) (taxable? how much?)
 - iii. 1099- INT, 1099-DIV Interest & Dividends (State Exempt?)
 - iv. [1099-R, RRB, SSA](#) – Pension, Annuity, RMD, Railroad and [Social Security](#)
 - v. [1099-G Unemployment Compensation](#)
 - vi. [Schedule C Training](#)
 - i. [1099 – Misc & 1099 - NEC](#)
 - vii. [1099-K Third Party Payments](#)
 - viii. [Schedule C – Self Employment](#)
 - i. [Schedule C Worksheet](#)
 - ix. Schedule D Capital Gains & Losses
 - i. [Broker Statements](#)
 - ii. [Sale of Principal Residence = Part 1](#)
 - iii. [Sale of Principal Residence = Part 2](#)
 - x. [Schedule E](#) - Royalties
 - xi. Alimony Received
 - xii. [Other Income](#)
 - i. [Gambling](#)
 - ii. Cancellation of Debt
- i. Deductions
 - i. Adjustment to Income
 - i. Educator Expenses
 - a. Hours & limits
 - ii. [Health Savings Accounts](#)
 - iii. [Long Term Care](#)
 - iv. Savings or CD Penalties
 - v. Alimony Paid
 - vi. IRA Deduction
 - a. Maximum allowable
 - vii. Student Loan Interest
 - viii. Tuition & Fees
 - a. See also Tax Credits
 - ix. Other Adjustments
 - a. Jury Duty
 - ii. [Schedule A](#)
 - i. [General Sales Tax](#)
 - iii. Tax Credits
 - i. [Childcare Credit](#)
 - ii. [Educational Credits](#) (1098-T & Statement)
 - iii. Retirement Savings Credit
 - iv. First Time Homebuyer
- j. Payments & Estimates
 - i. Federal Estimated Payments
 - ii. State Estimated Payments
 - iii. Underpayment

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- iv. Vouchers (Federal)
 - k. Miscellaneous Forms
 - i. Injured Spouse
 - ii. Form 1310
 - iii. IRS Identity PIN
 - l. Health Insurance
 - i. [Form 1095-A](#)
- 4. AZ State Return – [Supplementary Intake Form](#), [AZ Cactus Guide](#)
 - i. **VITA/TCE Quick Reference Guide**
 - ii. Basic Information
 - a. Residence Status – Resident, Part Year Non-Resident
 - b. Pension Exclusion – Gov, Military
 - c. Ancestor Exclusion
 - d. Qualifying Parents, Dependents
 - iii. Additions to Income
 - a. Most are Out of Scope or for Advanced Counselors
 - iv. Subtractions from Income
 - a. American Indian wages
 - b. 529 & 529A Plans
 - c. Long Term Capital Gains exclusion
 - d. Long Term Care Premiums
 - v. Standard or Itemized Deduction
 - a. Federal Medical reduction
 - vi. Tax Credits
 - a. Property Tax Credit – PTC140
 - b. Other State Taxes Paid – Form 309
 - c. Qualified Charitable Organizations – Form 321
 - d. Public School Fees & Contributions – Form 322
 - e. School Tuition Organizations – Form 323 & 348
 - f. Foster Care Charitable Organizations _ Form 352
 - g. Military Family Relief Fund – Form 340
 - vii. Voluntary Contributions
 - viii. Payments
 - ix. Miscellaneous Forms
 - a. Estimated Payment Vouchers
- b. Review 1040
 - i. Review 1040 Summary
- c. Summary Print
 - i. Return Details
 - ii. Consent Form (Intake Booklet)
 - iii. Custom Questions
 - iv. Submission Page
 - i. Verify Amounts

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- ii. Return tags (site specific)
- iii. Mark tax return ready for review
- iv. Save and exit

5. Resources

- a. [Colorado Resource Toolbox - Video](#)
 - i. Filing Status
 - ii. Education
 - iii. Annuity
- b. [Arizona Tax-Aide website](#)
 - i. Login (Vol ID & a_Phone_z)
 - ii. Main Screen – Links
 - i. Colorado Resource, Portal, TSO - PL
 - iii. Training Tab > Arizona Information
- c. Link & Learn
- d. NTTC Video Library & Slides
- e. Instructors & Mentors

6. Scope

- a. [Scope Manual](#)
- b. [Adhering to Scope-Video](#)
- c. Region & Arizona – Out of Scope – (AZ Scope)
- d. Friends & Family

7. [Chromebook Training](#) – Practice and Q&A

- a. CB Start Up & Login [Chromebook Accounts & Quick Start](#)
- b. Keyboard Shortcuts [Keyboard Shortcuts](#)
- c. Recovery, Website links [Password Recovery](#)
- d. Operating System & Network Connectivity

Open Session – Q & A



Guide:

BLUE Links – NTTC Documents

RED Links – AZ Tax-Aide website directory, requires log in

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Instructor Resources:

Resources are in the AARP Volunteer Portal – Tax Law & Training Folder
Technology resources are in the AARP Volunteer Portal – Technology Folder

List of [Direct Links to NTTC](#) documents

[NTTC Training Handbook TY23](#)

[NTTC Training Bulletins](#)

[NTTC Workbook TY23](#) – Practice Exercises

[NTTC Workbook Instructors Guide](#)

NTTC Workbook Answers – (AZ website)

[NTTC Catalog](#) – List of all available materials

[NTTC Table of Contents](#) – Prospective Volunteer Library

[Form 13614 – Intake Booklet](#)

[NTTC Enrichment Sessions](#) – See published schedule.

[NTTC Federal Tax Introduction](#) – Basic structure of 1040 and schedules 1, 2, 3

[Pub 4012](#) (E-version) – for Federal Tax Law – TSO input.

[Pub 4012 – Read Me](#)

[Pub 4012 Errata](#)

[Pub 4491](#) (E-version) – used to learn tax law and take quizzes.

[Pub 6744](#) – Link & Learn Certification Test/Retest

[NTTC Training Videos](#) – see [New Volunteer Training Videos 9.22](#)

[NTTC Training \(Core\) Exercises](#) including PowerPoint presentations

[Andrews](#), [Baker](#), [Caldwell](#) & [Davenport](#)

[Helpful Tax Websites](#)

Daily Lesson Plan – [NCT-Sample Syllabus](#) – AZ website – Instructor Area

Homework Q&A

Introduce topic (presentation, video, discussion, Q&A)

Demonstrate input requirements

Assign exercise – students practice (AGI and Refund \$'s provided)

Discuss input concerns and correct errors

Assign homework (exercise, reading)

Open lab time with mentors