

Arizona Returning Counselor Training Plan – TY23

1. **Welcome:** **R** Required; **O** Optional
 - a. AARP Tax-Aide Mission
 - b. Course Evaluation Form
 - c. [NTTC Useful Tax Prep Links](#)





2. **Certification:** **R**
 - a. Handout - [Certification_TY23.docx](#)
 - b. Presentation – [Certification TY23.pptx](#)
 - c. Resources –
 - i. IRS - [Pub 6744](#)
 - ii. IRS - [Link & Learn](#) – My Account, Advanced Tab
 - iii. IRS – Volunteer Agreement 13615 - Approval
 - iv. IRS – [CE Credits](#)
 - v. TSO – [Practice Lab](#)
 - vi. AARP - LMS – required training (by assignment)
 - vii. AZ – [NTTC workbook](#) – 4 Exercises
 - viii. AZ - State Tax training

3. **Scope:** **R**
 - a. Presentation - [Scope_TY23.pptx](#)
 - b. NTTC – [Scope Manual](#)
 - i. Out of Scope in Pub 4012 (E – Version)
 - ii. [Pub 4012 – NTTC w/scope](#)
 - c. Region & State - Out of Scope Training
 - d. Friends & Family - Requirements

4. **Federal Tax Law Changes:** **R**
 - a. Presentation – Federal Tax Law Changes – [Part 1](#) [Part 2](#)
 - b. [Index of Training Videos](#)
 - c. Areas of Concern
 - i. [Advanced Filing Status](#)
 - ii. [Child & Relative Tool](#)
 - iii. [State Tax Refunds](#) – How to calculate correct taxable amount?
 - iv. [Schedule C](#) [Worksheet](#)
 - v. [Schedule K-1](#)
 - vi. Amended Returns – [Part1](#), [Part 2](#)
 - vii. [Quality Review](#)
 - viii. [Tax Return Accuracy](#)

5. **Arizona Tax Law Changes:** **R**
 - a. Presentation – [AZ Tax Law Changes_TY23.v1.pptx](#)
 - b. Cactus Guide – [Cactus Guide.pdf](#)
 - c. AZ Tax Credit training – [AZ Tax Credits Review_TY23.pptx](#)
 - d. AZ Exercise & Test – [EARP & SMITH Exercises](#)

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6. **TaxSlayer:**  **Demo TSO – Practice Lab**
 AZ website > Tax Prep > Training & TaxSlayer > TaxSlayer Training
- a. Log In Instructions
 - i. Password Requirements
 - ii. User Guides
 - iii. Create New Return
 1. Client List
 2. Tax Year
7. **AZ Website:**  **Demo www.aztax-aide.org**
- a. Login Requirements
 - b. Main Screen Links – AARP Portal, Pub 4012, Bogart
 - c. Tax Preparation Tab
 - i. Arizona Taxes
 1. 9 Categories
 - ii. Chromebook & Tech
 1. Chromebook Guides
 - iii. Tools & Information
 1. Colorado Resource Toolbox
 2. Handouts, Manuals & Pub’s
 3. Other Links
 4. STAP Guidelines
 - iv. Training & TaxSlayer
 1. Certification & Testing
 2. TaxSlayer Training
 3. Training Manuals, Videos and Presentations
8. **[Colorado Resource Toolbox](#)** 
- a. Annuity
 - b. Filing Status
 - c. Education
9. **Chromebook Training:** 
- a. **Hands-On Practice and Q&A**
 - b. Log into CB > Your Chromebook Account
 - i. Remove User
 - ii. Network Connection
 - iii. Google Chrome Link (bottom shelf)
 - c. Demo Tax-Aide Links in browser window
 - d. Demo – add websites to Favorites Bar
 - i. Add: AZ website; AZ DOR

Open Session – Q & A