BASIC A:
TAX RETURN BASICS

TAX YEAR 2023

This training is approximately 2.5 hours. We will have a break about halfway through.

PREPARE + PROSPER

INTRODUCE YOURSELF

- Introduce yourself to someone sitting near you
- Share your name (and pronouns if you would like)
- How did you get connected to Prepare + Prosper?

PREPARE + PROSPER

PREPARER TRAINING OVERVIEW

- Basic A: Tax Return Basics
- Basic B: Filing Status & Dependency
- Basic C: Income & Adjustments
- Basic D: Tax Credits
- Basic E: Form M1PR & Finishing a Return
- Software Lab: Practice return preparation with TaxSlayer

PREPARE + PROSPER

TRAINING WEBSITE

- Extra material that complements live training topics
  - Self-paced material to read or watch
- Copies of these training slides available on the volunteer training site
- Access it at prepareandprosper.moodlecloud.com

BASIC A OVERVIEW

- P+P overview
- Tax return crash course
- Introduction to TaxSlayer

PREPARE + PROSPER

GOALS FOR TODAY

- You understand the work of Prepare + Prosper and the VITA program
- You get an introduction to (or review of) important tax terminology
- You can log into the TaxSlayer Practice Lab
- You know how to start a new return in TaxSlayer

WHAT WE DO—AND WHY!

PREPARE + PROSPER

OUR PROGRAMS

Prepare + Prosper

Tax Preparation & Financial Services	Money Mentors Financial Coaching	FAIR Banking	Advocacy

FREE TAX PREPARATION

- Every year tax credits lift more than 8.9 million people above federal poverty guideline
- P+P customers saved over $1.8 million in tax preparation fees by using a free service in 2023
- IRS Volunteer Income Tax Assistance program operates nation-wide

PREPARE + PROSPER

P+P Manual pg. 15

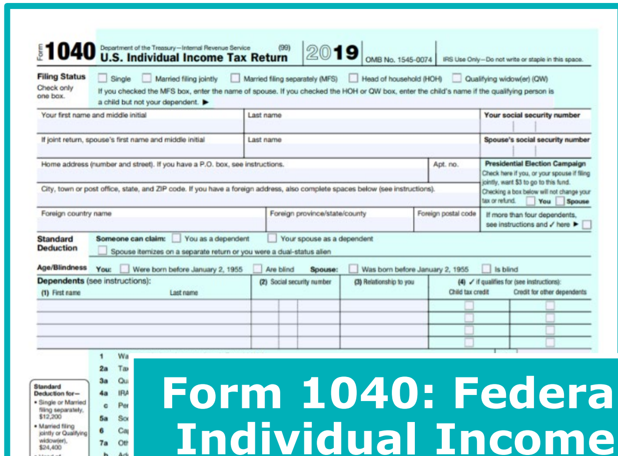
FINANCIAL SERVICES & REFERRALS

Tax time is a money moment when people can improve their finances.

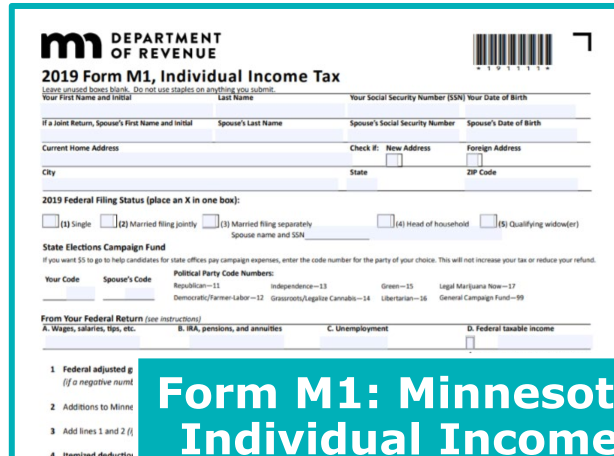
P+P TAX RETURN CRASH COURSE

PREPARE + PROSPER

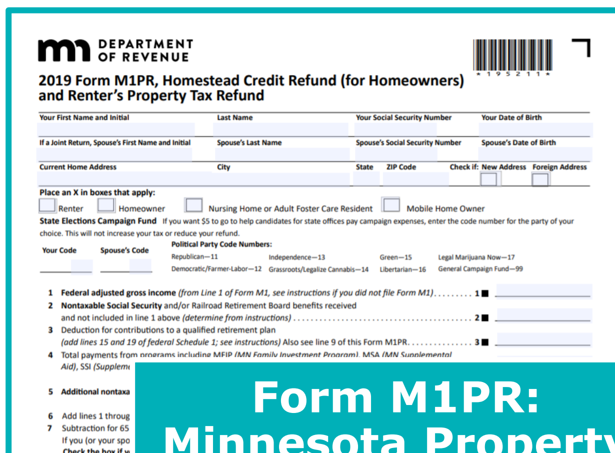
RETURNS WE DO



Form 1040: Federal Individual Income Tax Return



Form M1: Minnesota Individual Income Tax Return



Form M1PR: Minnesota Property Tax Refund

PREPARE + PROSPER

P+P Manual pg. 17-18 and Pub 4012 pg. 6-21

SCOPE OF SERVICE

SCOPE OF SERVICE

VITA sites nationwide have a shared scope of service. Preparing out of scope returns or returns that do not match a volunteer's certification level violates the VITA Volunteer Standards of Conduct. Use the scope charts, the taxpayer's intake paperwork, and the tax interview to verify if a return is in scope. Pub 4012 has an extensive chart outlining VITA scope. **Always consult the chart in Pub 4012 if the P+P manual is unclear.** P
require an appointment with specific volunteers or st

P+P income guidelines
Income is $35,000 or less for a single taxpayer with no dependents
Income is $55,000 or less for a married or single taxpayer with dependents or taxpayers with self-employment income (see next chart section)
Income is over limits stated above. *Check with manager for exceptions*

Self-employment income
Self-employment income and other income over $55,000
Self-employment income from: • Driving a taxi cab • Acting as a clergy member • Farming or hobbies • Rental property • Day trading • Participating in a corporation or partnership

Scope of Service

When using the list, please note that column 3 (In Scope?) does not stand alone. Additional information contained in columns 4 and 5 (Scope Limitations and Certification Levels) may include topics or certification levels that affect whether volunteers may or may not prepare the return under the provisions of the Volunteer Protection Act.

If no certification level is listed, the topic is in scope for all certification levels.

Many forms and schedules that are out of scope are included as reference. If a form or schedule is not listed, it is out of scope because no training has been provided. In addition, if a volunteer has not been trained on an in-scope tax law topic, that topic is out of scope for that volunteer.

F(orm) or S(chedule) Number	Line or Box Number	In Scope? Y or N	Scope Limitations	Certification Levels
F 1040	Digital asset (virtual currency) question	Y	In scope if taxpayers can check the No box. Taxpayers check No if they: • held no virtual currency for the tax year or if the taxpayer's only trans-actions involving virtual currency during the tax year were purchases of virtual currency with real currency • held virtual currency in a wallet or account • transferred virtual currency from one wallet or account they own or con-trol to another that they own or control • received virtual currency as an inheritance or gift	
F 1040	1	Yes	Wages, salaries, tips, etc.	Advanced certification required for unreported tip income.
F 1040	2a, b	Yes	Tax-exempt and taxable interest See F 1099-INT for limitations	
F 1040	3a, b	Yes	Qualified and Ordinary dividends See F 1099-DIV for limitations	
F 1040	4a, 4b, 5a, 5b	Yes	IRAs, pensions and annuities See F 1099-R for limitations **Not in scope for:**	Basic certification if taxable amount is determined. Advanced

PREPARE + PROSPER

P+P INCOME GUIDELINES

$40,000 or less for single taxpayer

$60,000 or less for families

WHAT GOES ON A TAX RETURN?

- All income is reported
  - There are some exceptions, but generally, all income is taxable
- Certain expenses and life situations
  - Incentivized by tax law to allow adjustments, deductions, subtractions, or credits
- Additional forms and schedules are used to report the special situations

PREPARE + PROSPER

ACTIVITY:
TAX TERMS MATCH UP

USE THE ACTIVITY HANDOUT

TAX TERMS MATCH UP ANSWERS

1 -> C

2 -> K

3 -> H

4 -> I

5 -> F

6 -> E

7 -> B

8 -> D

9 -> J

10 -> G

11 -> A

PREPARE + PROSPER

RESOURCES AND IRS CERTIFICATION

PREPARE + PROSPER

PEOPLE RESOURCES

- Managers and experienced volunteers can help:
  - Answer tax questions
  - Troubleshoot TaxSlayer problems
  - Help with procedural issues
- Managers coordinate the flow of tax clinics
  - Kick off with a team Huddle
  - Ensure things are on track throughout the shift

KNOW YOUR TEAM

CSV
- Greeting
- Financial services & referrals
- Checkouts
- 2-3 per shift

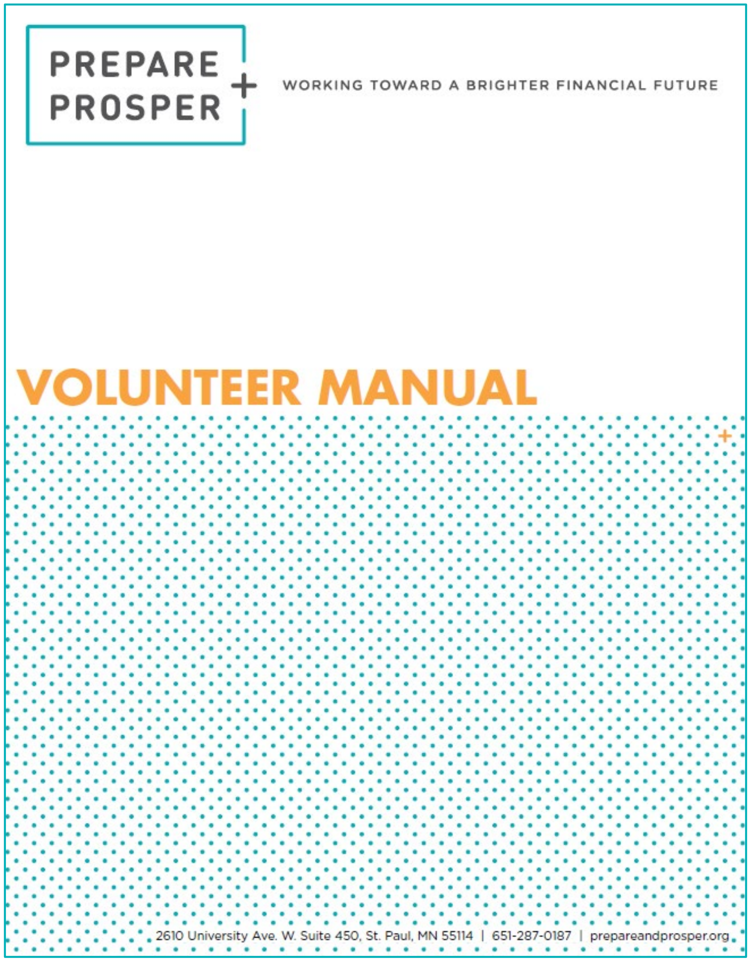
Preparer
- Interview customers
- Prepare tax return
- 4-8 per shift

Reviewer
- Double check tax return
- Correct mistakes
- 2-3 per shift

Site Manager
- Pre-clinic Huddle
- Coordinate flow
- Answer questions
- 2 per shift

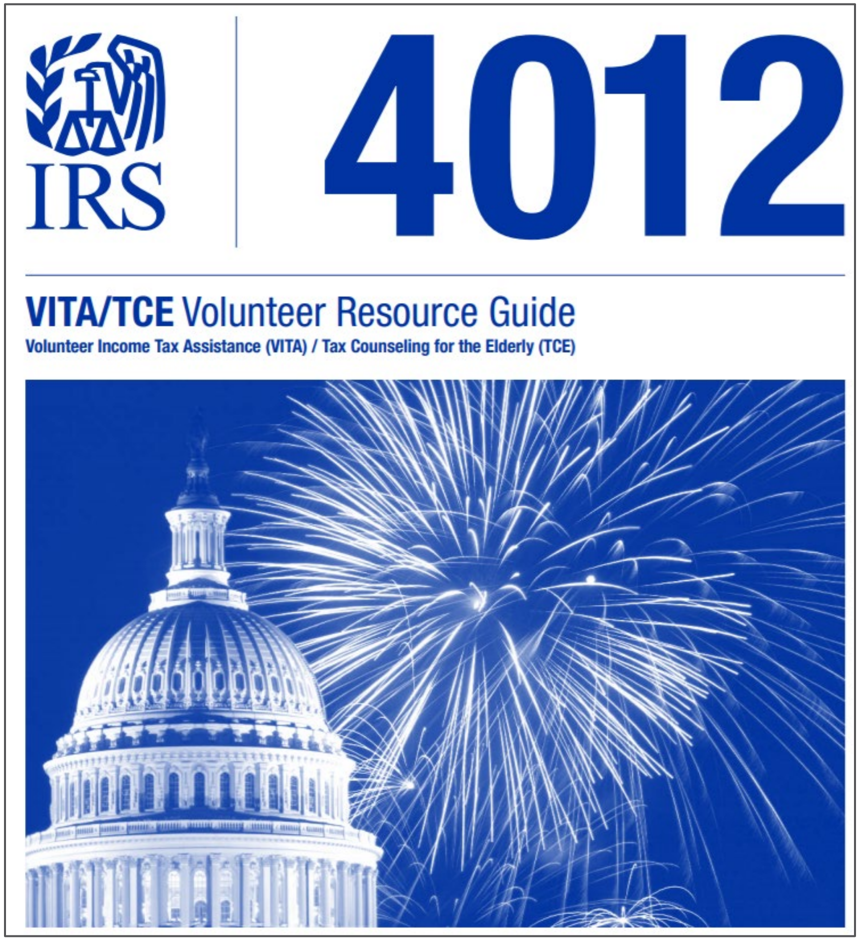
CSV stands for Customer Support Volunteer

P+P VOLUNTEER TAX MANUAL



- Combines federal and Minnesota tax law
- Provides software instructions
- Gives "at-a-glance" summaries for credits and income
- Available virtually on the P+P volunteer training site

PUBLICATION 4012



- Excellent reference guide for federal tax law
- Flow charts and interview questions
- TaxSlayer entry instructions
- Available virtually on the P+P volunteer training site

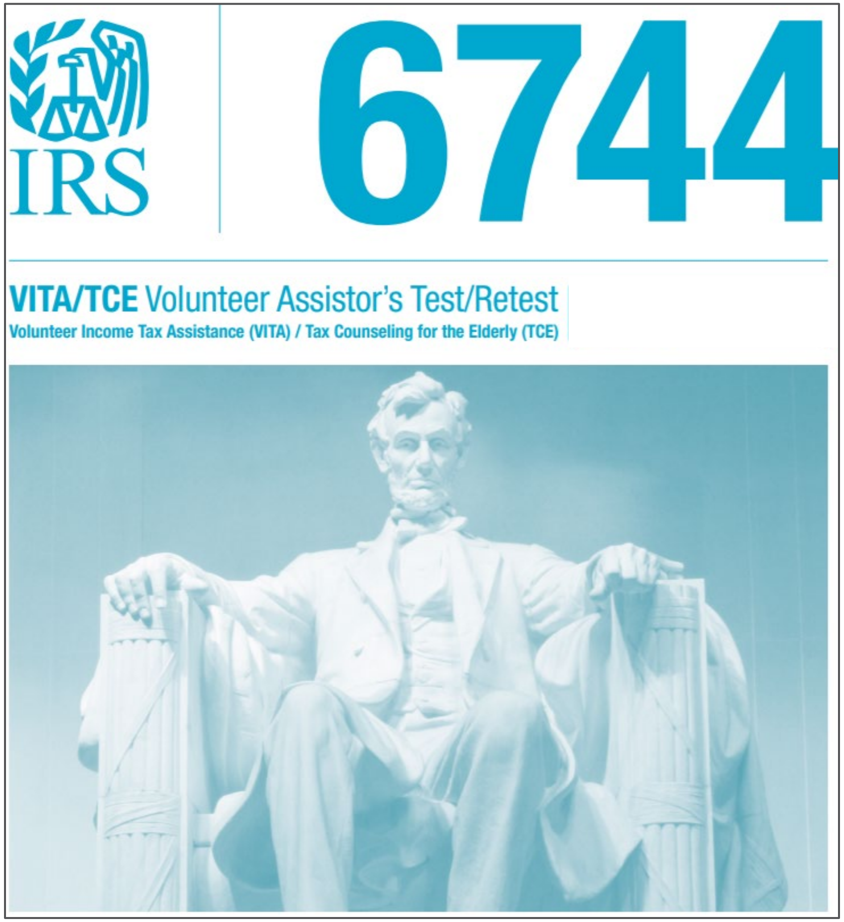
PREPARE + PROSPER

MINNESOTA INSTRUCTION BOOKLETS

- Provides plain language instructions for Minnesota tax law
- Available virtually on the P+P volunteer training site
- Copies available at the tax site
- Minnesota Tax Fact Sheets online provide greater detail

IRS CERTIFICATION TESTS

- Tests must be completed before volunteering
- Preparers must take these tests:
  - Volunteer Standards of Conduct
  - Intake/Interview and Quality Review
  - Basic tax law or Advanced tax law



IRS CERTIFICATION TEST TIPS

- Tests are "open book" and there is no time limit
- To pass, must receive a score of 80% or higher
- Retest option is available if needed
- Test resources:
  - P+P volunteer tax manual
  - Pub 4012, Pub 4961, Pub 5101
  - Trainings on the P+P training site
  - IRS Publications
  - Internet search

VOLUNTEER STANDARDS OF CONDUCT (VSC)

- Six VITA volunteer standards of conduct
- Provide a shared ethical code for VITA sites across the nation
- Standards require volunteers to:
  - Not solicit payments or business from taxpayers
  - Conduct accurate, respectful, and professional work
  - Follow specific tax clinic procedures related to intake process and data security

INTAKE/INTERVIEW & QUALITY REVIEW STANDARDS

- **Intake:** ID and Social Security number or ITIN documentation must be viewed
- **Interview:** Preparer uses IRS Form 13614-C to do a detailed tax interview
  - All questions must be answered
  - Unsure questions must be corrected to yes or no
  - Return is categorized as Basic, Advanced, or out-of-scope
- **Quality review:** All returns are reviewed by a volunteer who did not prepare the return
  - Taxpayer is involved in final review
  - Volunteers inform taxpayers of their responsibility for the accuracy of the return
  - Taxpayers sign the return

BASIC VS ADVANCED CERTIFICATION

Basic

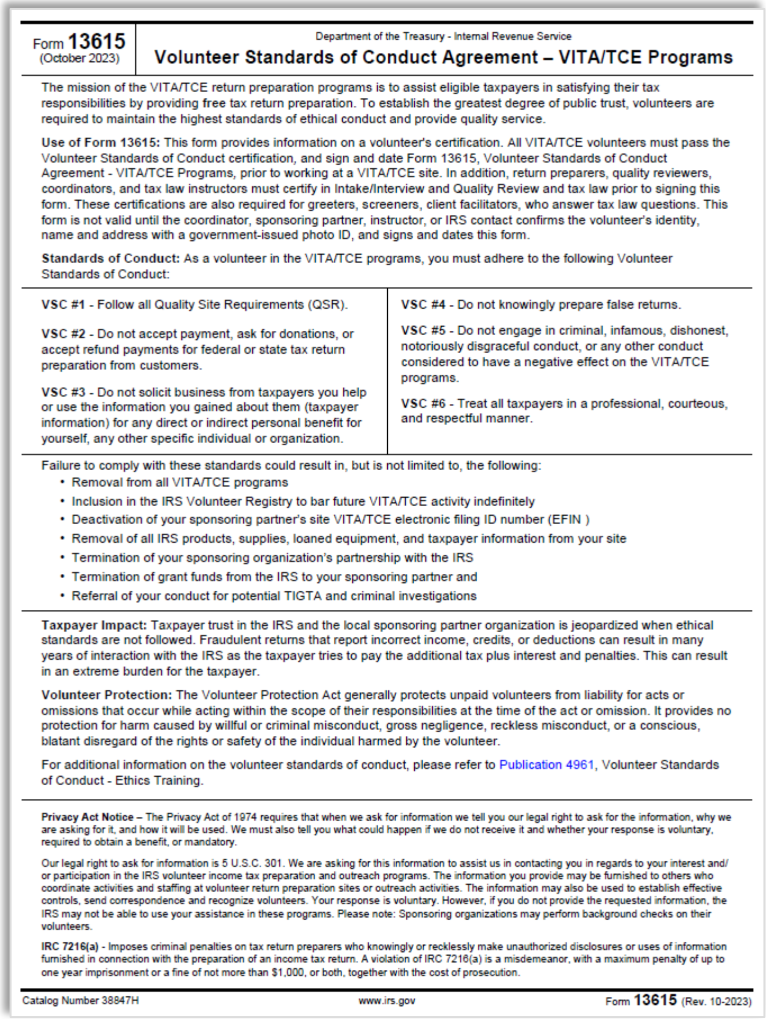
- Filing status and dependents
- W2, interest and dividend incomes
- Some retirement income
- Education credits
- Minnesota topics

Advanced

- Self-employment
- Capital gains and stock sales
- Some retirement income
- Premium tax credit
- Health Savings Accounts

IRS TEST VERIFICATION

- Email Form 13615, Volunteer Agreement, to P+P after testing
- Signing this form confirms you will follow the Volunteer Standards of Conduct
- Download form from the testing website
- P+P must keep forms for all volunteers on file due to IRS rules



Form **13615** (October 2023)

Department of the Treasury - Internal Revenue Service

Volunteer Standards of Conduct Agreement – VITA/TCE Programs

The mission of the VITA/TCE return preparation programs is to assist eligible taxpayers in satisfying their tax responsibilities by providing free tax return preparation. To establish the greatest degree of public trust, volunteers are required to maintain the highest standards of ethical conduct and provide quality service.

Use of Form 13615: This form provides information on a volunteer's certification. All VITA/TCE volunteers must pass the Volunteer Standards of Conduct certification, and sign and date Form 13615, Volunteer Standards of Conduct Agreement - VITA/TCE Programs, prior to working at a VITA/TCE site. In addition, return preparers, quality reviewers, coordinators, and tax law instructors must certify in Intake/Interview and Quality Review and tax law prior to signing this form. These certifications are also required for greeters, screeners, client facilitators, who answer tax law questions. This form is not valid until the coordinator, sponsoring partner, instructor, or IRS contact confirms the volunteer's identity, name and address with a government-issued photo ID, and signs and dates this form.

Standards of Conduct: As a volunteer in the VITA/TCE programs, you must adhere to the following Volunteer Standards of Conduct:

VSC #1 - Follow all Quality Site Requirements (QSR).

VSC #2 - Do not accept payment, ask for donations, or accept refund payments for federal or state tax return preparation from customers.

VSC #3 - Do not solicit business from taxpayers you help or use the information you gained about them (taxpayer information) for any direct or indirect personal benefit for yourself, any other specific individual or organization.

VSC #4 - Do not knowingly prepare false returns.

VSC #5 - Do not engage in criminal, infamous, dishonest, notoriously disgraceful conduct, or any other conduct considered to have a negative effect on the VITA/TCE programs.

VSC #6 - Treat all taxpayers in a professional, courteous, and respectful manner.

Failure to comply with these standards could result in, but is not limited to, the following:

- Removal from all VITA/TCE programs
- Inclusion in the IRS Volunteer Registry to bar future VITA/TCE activity indefinitely
- Deactivation of your sponsoring partner's site VITA/TCE electronic filing ID number (EFIN)
- Removal of all IRS products, supplies, loaned equipment, and taxpayer information from your site
- Termination of your sponsoring organization's partnership with the IRS
- Termination of grant funds from the IRS to your sponsoring partner and
- Referral of your conduct for potential TIGTA and criminal investigations

Taxpayer Impact: Taxpayer trust in the IRS and the local sponsoring partner organization is jeopardized when ethical standards are not followed. Fraudulent returns that report incorrect income, credits, or deductions can result in many years of interaction with the IRS as the taxpayer tries to pay the additional tax plus interest and penalties. This can result in an extreme burden for the taxpayer.

Volunteer Protection: The Volunteer Protection Act generally protects unpaid volunteers from liability for acts or omissions that occur while acting within the scope of their responsibilities at the time of the act or omission. It provides no protection for harm caused by willful or criminal misconduct, gross negligence, reckless misconduct, or a conscious, blatant disregard of the rights or safety of the individual harmed by the volunteer.

For additional information on the volunteer standards of conduct, please refer to Publication 4961, Volunteer Standards of Conduct - Ethics Training.

Privacy Act Notice – The Privacy Act of 1974 requires that when we ask for information we tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it and whether your response is voluntary, required to obtain a benefit, or mandatory.

Our legal right to ask for information is 5 U.S.C. 301. We are asking for this information to assist us in contacting you in regards to your interest and/or participation in the IRS volunteer income tax preparation and outreach programs. The information you provide may be furnished to others who coordinate activities and staffing at volunteer return preparation sites or outreach activities. The information may also be used to establish effective controls, send correspondence and recognize volunteers. Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to use your assistance in these programs. Please note: Sponsoring organizations may perform background checks on their volunteers.

IRC 7216(a) - Imposes criminal penalties on tax return preparers who knowingly or recklessly make unauthorized disclosures or uses of information furnished in connection with the preparation of an income tax return. A violation of IRC 7216(a) is a misdemeanor, with a maximum penalty of up to one year imprisonment or a fine of not more than $1,000, or both, together with the cost of prosecution.

Catalog Number 38847H www.irs.gov Form **13615** (Rev. 10-2023)

PREPARE + PROSPER

INTRODUCTION TO TAXSLAYER

PREPARE + PROSPER

TAXSLAYER SOFTWARE

- Provided by the IRS to VITA sites
- Guides preparers through the process of preparing the return
- Ensures all information that is required for electronic filing is provided

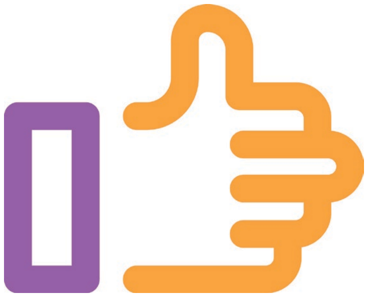
TaxSlayer®

TAXSLAYER ACCOUNTS

- You will have two TaxSlayer accounts
- Practice Lab account
  - Use for practice returns & certification test
- TaxSlayer Pro Online account
  - Use to prepare returns for taxpayers

READY TO DO A TAX RETURN?

- Use the TaxSlayer Practice Lab
- Prepare a simple return together
- Goals of this activity:
  - You access the Practice Lab and know how to navigate in it to start a new return.
  - You get to practice with TaxSlayer early in your volunteer training.
  - You can recognize how tax software supports the tax preparation process.



BREAK TIME & PRACTICE LAB LOGIN

- 15-minute break
- Login to the TaxSlayer Practice Lab
- Sign up for your account if you do not have one

OPEN TAXSLAYER PRACTICE LAB

- Go to: vita.taxslayerpro.com/IRSTraining
- Enter the Practice Lab access password: **TRAINPROWEB**
- Sign in with your account and click the "Go to Practice Area" button.
- Don't have an account? Create one now!
  - Use page 12 in your P+P Manual as a guide
  - Create a username and password
  - Select VITA as the program type
  - Skip the SIDN entry

BEFORE STARTING IN TAXSLAYER

USE CAPS LOCK

- Turn on Caps lock when preparing returns
- Doing data entry in all uppercase text eliminates capitalization errors
- All uppercase text makes it easier for reviewers to look over a return

BEFORE ENTERING DATA

With a real customer

- Review intake sheets thoroughly
- Review the tax forms
- Determine filing status and if dependents will be claimed
- Confirm return is in-scope for VITA and your certification level

Today's practice return

- Use streamlined customer information sheet
- Follow flow along with the instructor to prepare the return

MEET BEN NOLAN

Ben is filing his taxes with Prepare + Prosper for the first time. He brought all the documents he needs.

He's filing a return for **Tax Year 2023.**

PREPARE + PROSPER

RETURN INFO FOR BEN NOLAN

PREPARE + PROSPER

WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

BASIC A PRACTICE RETURN FOR BEN NOLAN

USE 2023 TAXSLAYER PRACTICE LAB

Ben is filing with Prepare + Prosper for the first time. He brought all of the documents he needs. Here's what you learn from him during the tax interview:

- Ben has never been married, lives on his own, and doesn't support anyone else financially. He will use the single filing status.
- Ben shared this basic information on his intake paperwork:
  - Date of birth: June 15, 1985
  - Occupation: Customer Service Agent
  - Address: 2610 University Ave W, Apartment 450, St. Paul, MN 55114
  - Phone number: 651-000-1111
- Ben worked at John's Service Agency, and this was his only job. He has Form W-2 for his job and had no other income during the year.
- Ben did not purchase health insurance from the MNsure marketplace.

22222	a Employee's social security number: 111-00-3001	OMB No. 1545-0008
b Employer identification number (EIN): 41-2222222	1 Wages, tips, other compensation: 16,000	2 Federal income tax withheld: 900
c Employer's name, address, and ZIP code: John's Service Agency, 123 Well Street, St Paul, MN 55110	3 Social security wages: 16,000	4 Social security tax withheld: 992
	5 Medicare wages and tips: 16,000	6 Medicare tax withheld: 232
	7 Social security tips	8 Allocated tips
d Control number	9	10 Dependent care benefits
e Employee's first name and initial / Last name / Suff.: Ben Nolan, 2610 University Ave W, Apt 450, St. Paul, MN 55114	11 Nonqualified plans	12a
	13 Statutory employee / Retirement plan / Third-party sick pay	12b
	14 Other	12c
f Employee's address and ZIP code		12d

15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name
MN	8888888	16,000	300			

Form **W-2** Wage and Tax Statement 2023

Department of the Treasury—Internal Revenue Service

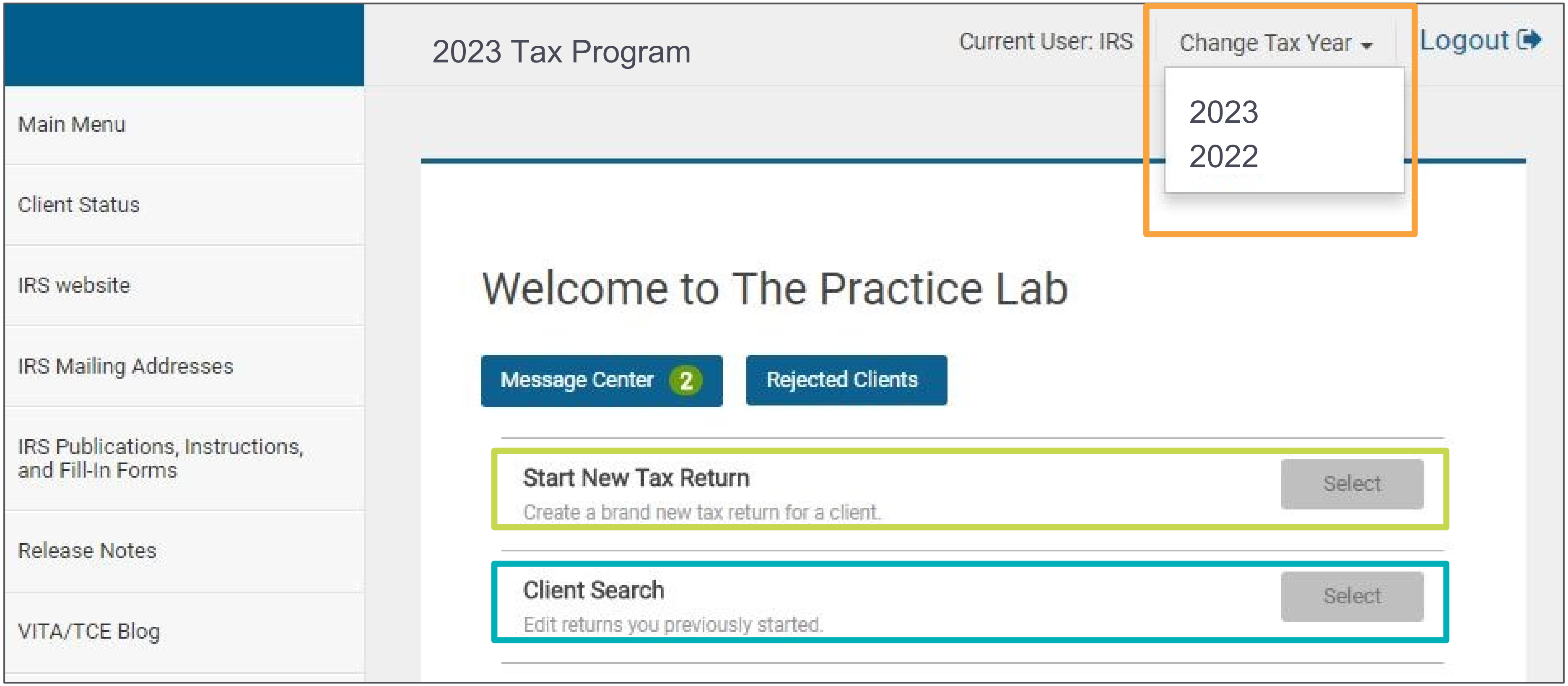
Copy 1—For State, City, or Local Tax Department

PREPARE + PROSPER

LET'S GET STARTED WITH TAXSLAYER

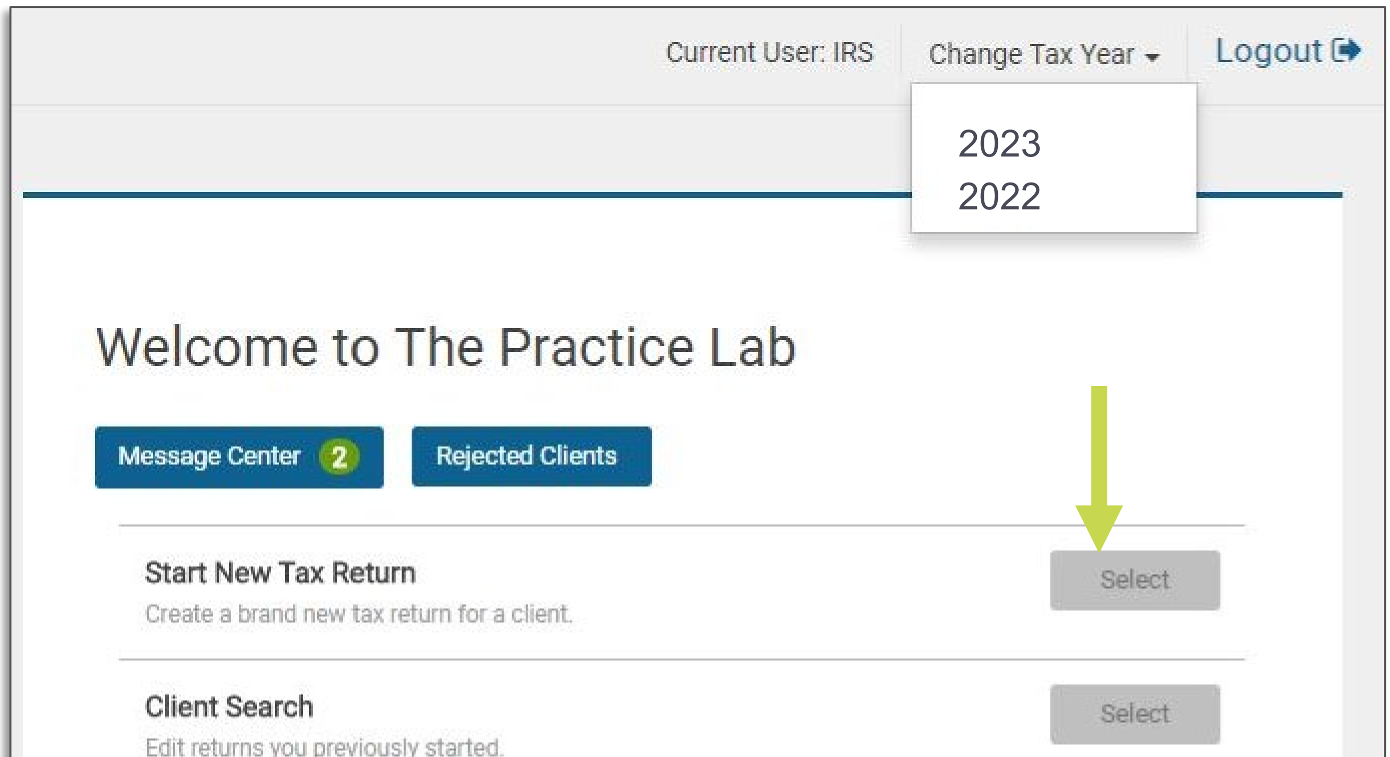
PREPARE + PROSPER

TAXSLAYER OFFICE



START BEN'S RETURN

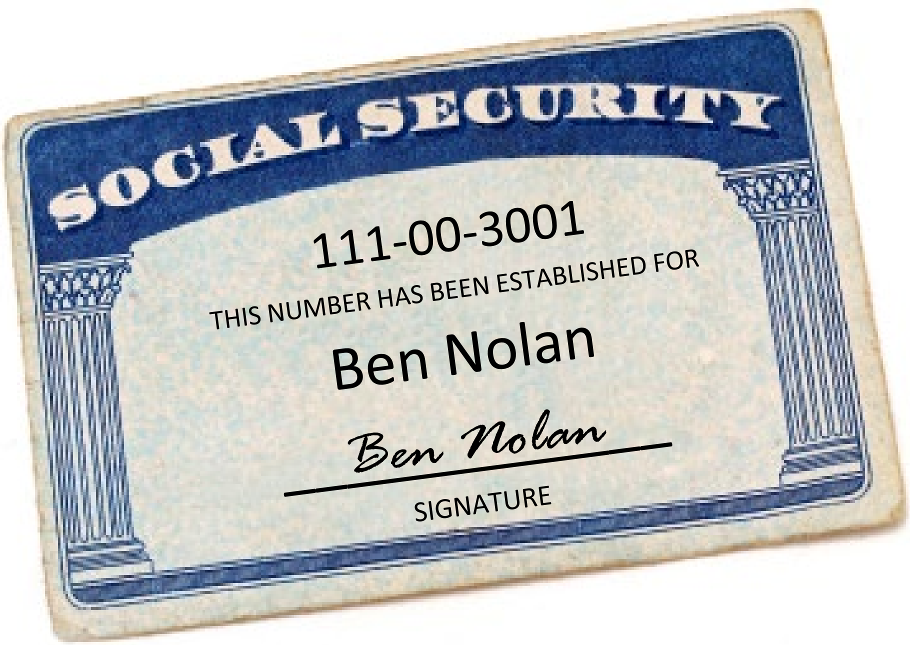
- Click Start New Tax Return

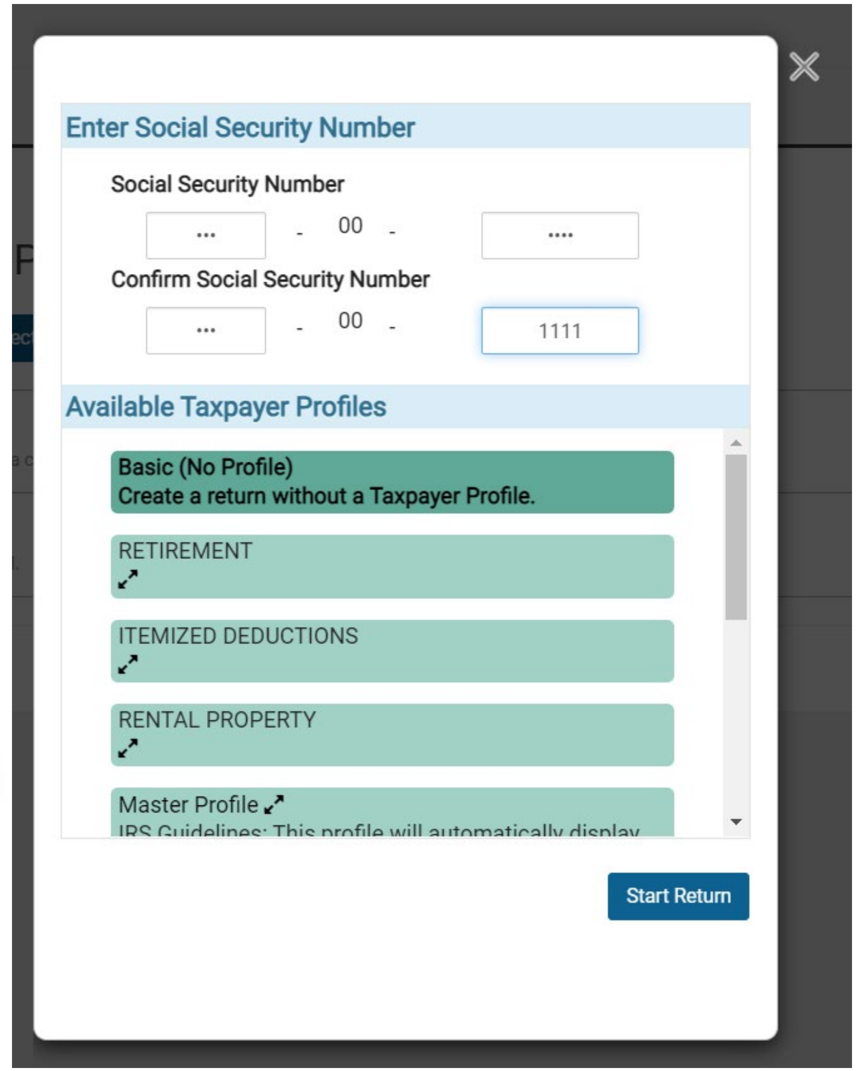


PREPARE + PROSPER

ENTER BEN'S SSN

Ben provides his Social Security card to verify his number.

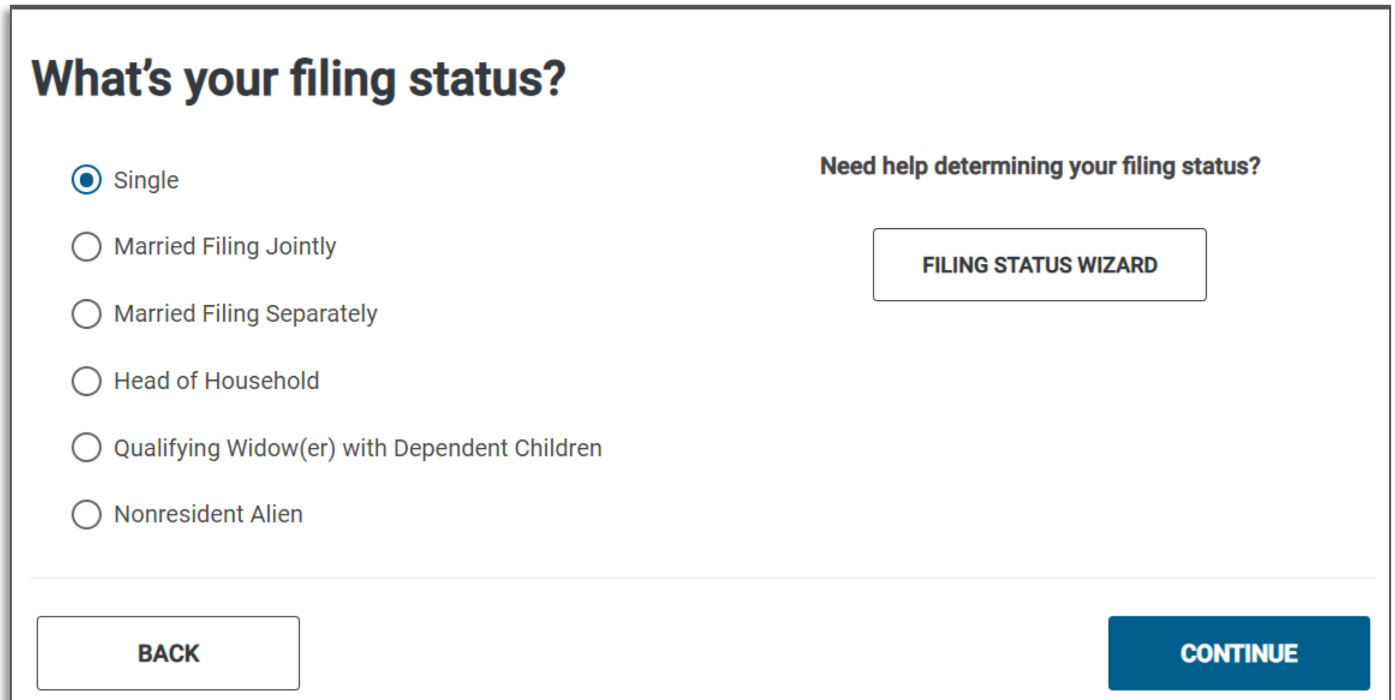




PREPARE + PROSPER

CHOOSE BEN'S FILING STATUS

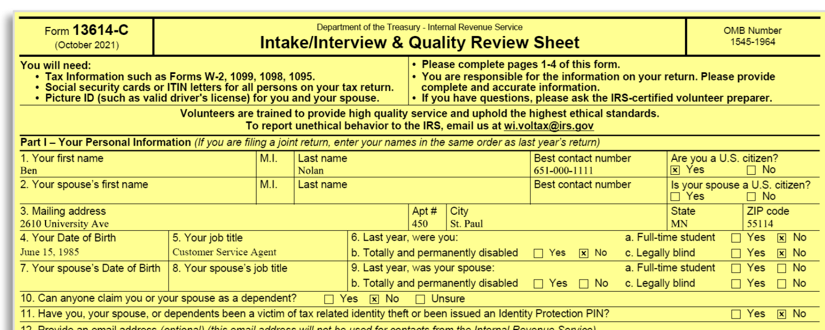
Ben has never been married, lives on his own, and doesn't support anyone else financially. He will use the single filing status.



ENTER BEN'S BASIC INFORMATION

Ben shared the following information on his intake paperwork:

- Name: Ben Nolan
- Date of birth: June 15, 1985
- Occupation: Customer Service Agent
- Address: 2610 University Ave W, Apartment 450, St. Paul, MN 55114
- Phone number: 651-000-1111



Form **13614-C** (October 2021) | Department of the Treasury - Internal Revenue Service | **Intake/Interview & Quality Review Sheet** | OMB Number 1545-1964

You will need:
- **Tax Information such as Forms W-2, 1099, 1098, 1095.**
- **Social security cards or ITIN letters for all persons on your tax return.**
- **Picture ID (such as valid driver's license) for you and your spouse.**

- **Please complete pages 1-4 of this form.**
- **You are responsible for the information on your return. Please provide complete and accurate information.**
- **If you have questions, please ask the IRS-certified volunteer preparer.**

Volunteers are trained to provide high quality service and uphold the highest ethical standards.
To report unethical behavior to the IRS, email us at wi.voltax@irs.gov

Part I – Your Personal Information *(If you are filing a joint return, enter your names in the same order as last year's return)*

1. Your first name Ben	M.I.	Last name Nolan	Best contact number 651-000-1111	Are you a U.S. citizen? ☒ Yes ☐ No
2. Your spouse's first name	M.I.	Last name	Best contact number	Is your spouse a U.S. citizen? ☐ Yes ☐ No

3. Mailing address 2610 University Ave	Apt # 450	City St. Paul	State MN	ZIP code 55114

4. Your Date of Birth June 15, 1985	5. Your job title Customer Service Agent	6. Last year, were you: a. Full-time student ☐ Yes ☒ No b. Totally and permanently disabled ☐ Yes ☒ No c. Legally blind ☐ Yes ☒ No
7. Your spouse's Date of Birth	8. Your spouse's job title	9. Last year, was your spouse: a. Full-time student ☐ Yes ☐ No b. Totally and permanently disabled ☐ Yes ☐ No c. Legally blind ☐ Yes ☐ No

10. Can anyone claim you or your spouse as a dependent? ☐ Yes ☒ No ☐ Unsure

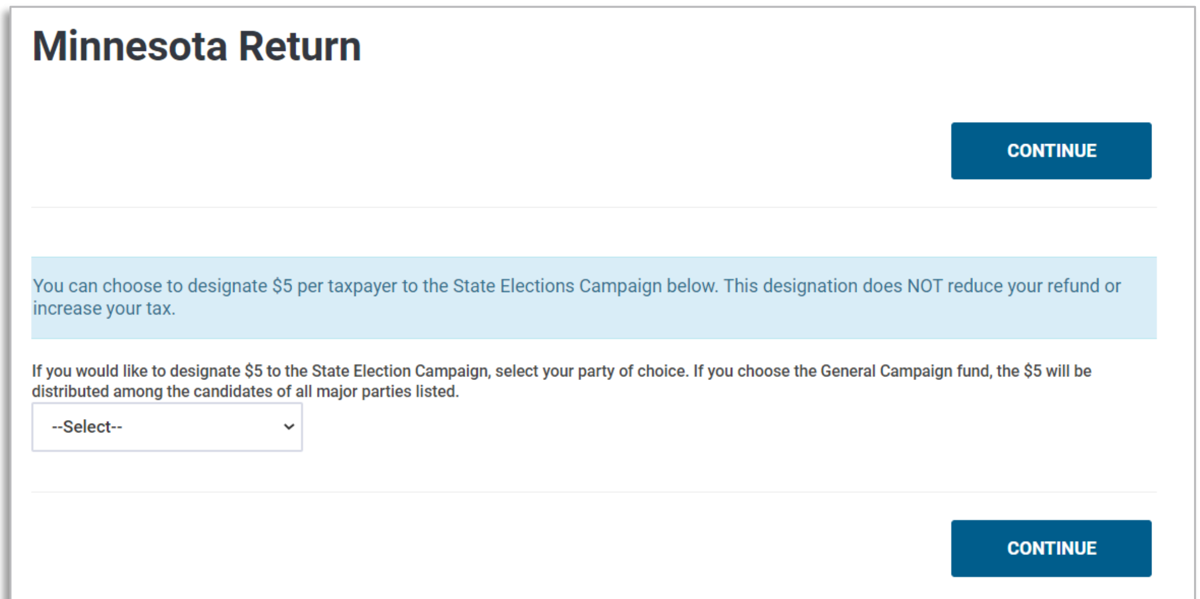
11. Have you, your spouse, or dependents been a victim of tax related identity theft or been issued an Identity Protection PIN? ☐ Yes ☒ No

12. Provide an email address *(optional) (this email address will not be used for contacts from the Internal Revenue Service)*

PREPARE + PROSPER

SKIP THE MN ELECTION CAMPAIGN FUND

- Ben doesn’t want to contribute.
- Click “Continue” without making a selection or choose “No Contribution” from the dropdown.



DEPENDENTS OR QUALIFYING PERSON(S)

- Ben does not have any dependents
- Select “No” and then “Continue”

Dependents or Qualifying Person(s)

BACK CONTINUE

Individuals who rely on you for your support and reside in your house generally qualify for dependent tax exemptions. However, there are situations when a child's exemption status is more complicated. The IRS has special rules for these situations.

Do you have any dependents or qualifying person(s) to claim on your return?

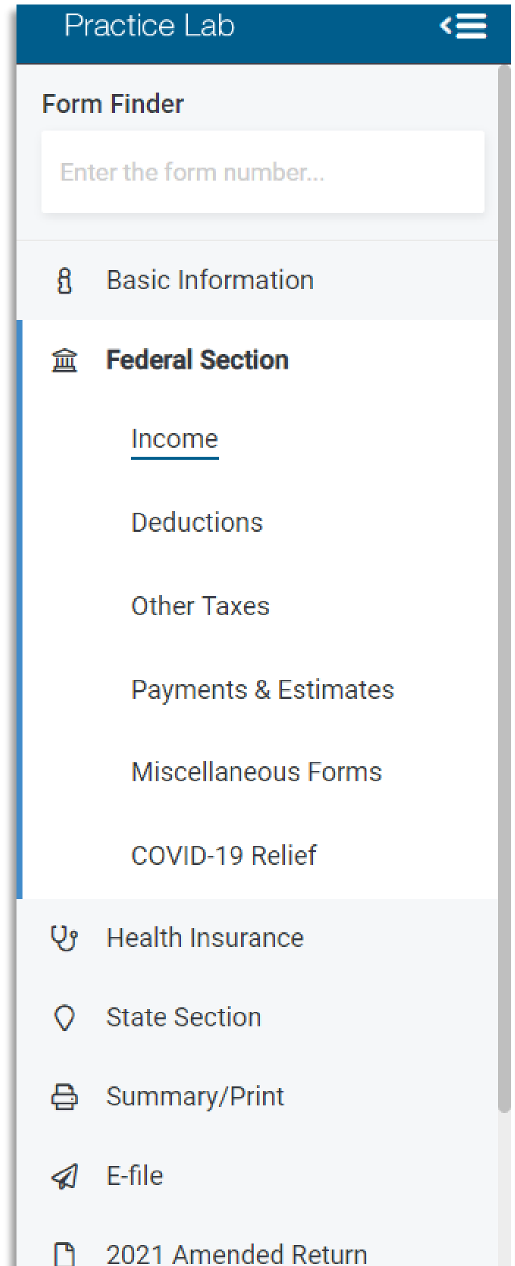
- ○ Yes
- ◉ No

BACK CONTINUE

PREPARE + PROSPER

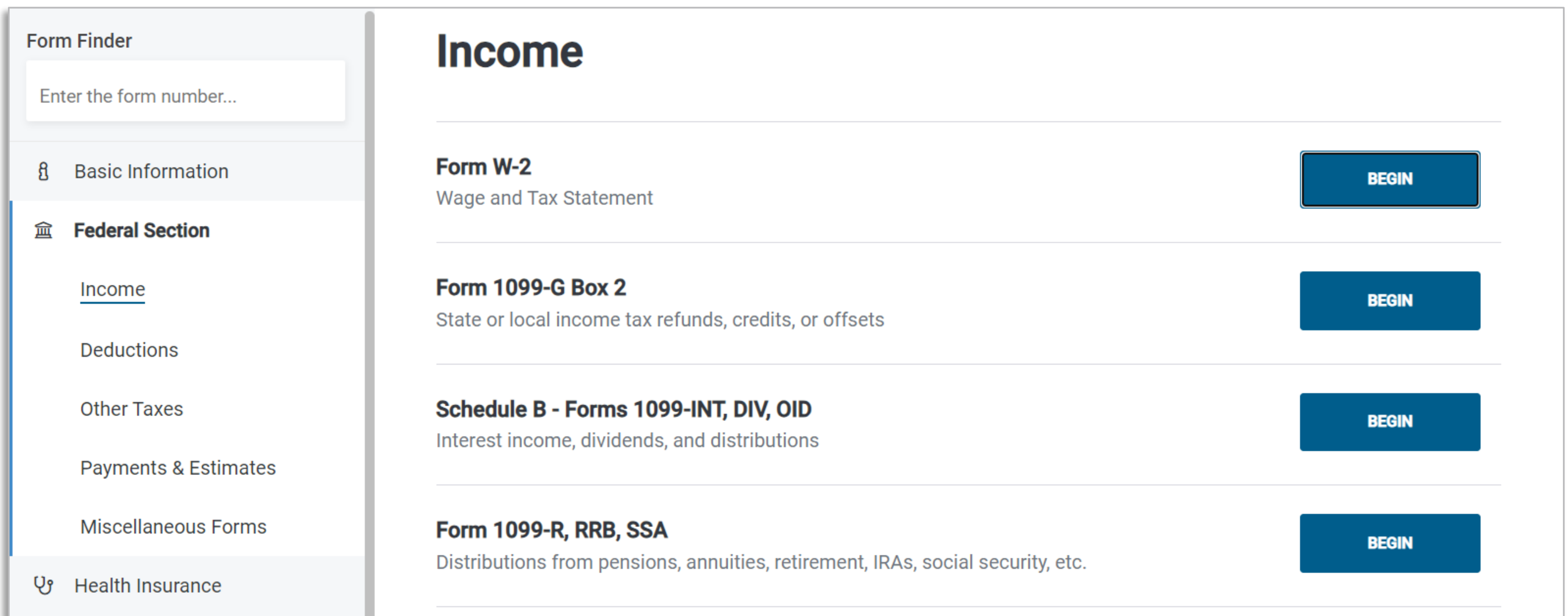
TAXSLAYER NAVIGATION MENU

- Use the left-hand navigation menu to move through the return efficiently
- Menu may collapse to save screen space
  - Hover over the icons on the left side of the screen
  - Use the Pin icon to keep the left menu visible



BEN'S INCOME

- Ben worked at John's Service Agency, and this was his only job.
- He has Form W-2 for his job and had no other income during the year.



ENTER BEN'S FORM W-2

22222

a Employee's social security number
111-00-3001

OMB No. 1545-0008

b Employer identification number (EIN)
41-2222222

c Employer's name, address, and ZIP code
John's Service Agency
123 Well Street
St Paul, MN 55110

1 Wages, tips, other compensation
16,000

2 Federal income tax withheld
900

3 Social security wages
16,000

4 Social security tax withheld
992

5 Medicare wages and tips
16,000

6 Medicare tax withheld
232

7 Social security tips

8 Allocated tips

d Control number

9

10 Dependent care benefits

e Employee's first name and initial   Last name   Suff.
Ben Nolan
2610 University Ave W, Apt 450
St. Paul, MN 55114

f Employee's address and ZIP code

11 Nonqualified plans

12a Code

13 Statutory employee / Retirement plan / Third-party sick pay

12b Code

14 Other

12c Code

12d Code

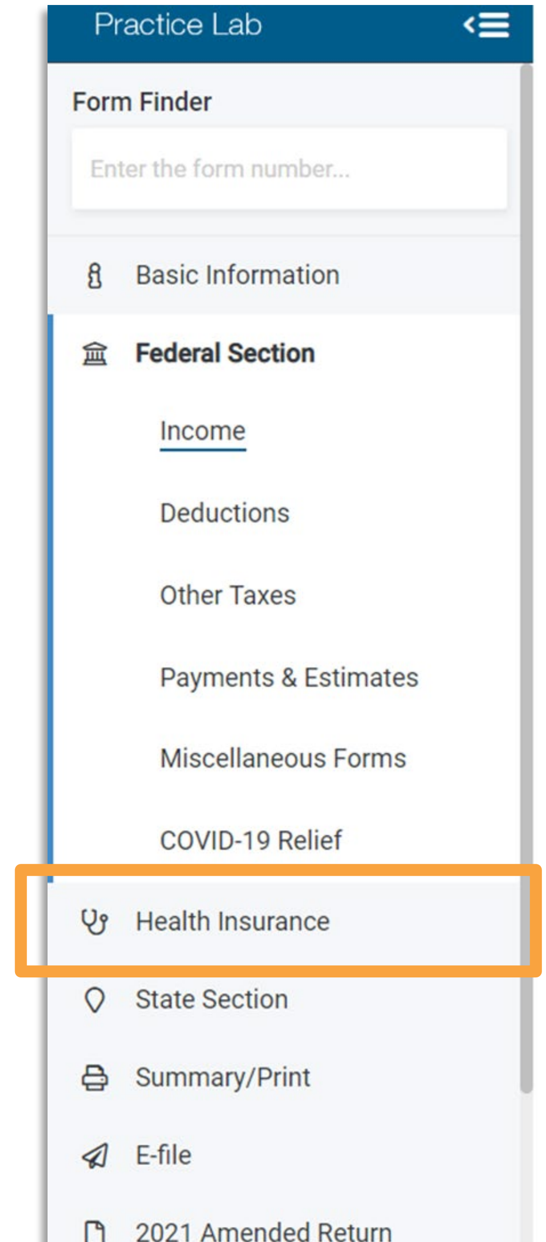
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name
MN	8888888	16,000	300			

Form **W-2** **Wage and Tax Statement** 2022

Department of the Treasury—Internal Revenue Service

Copy 1—For State, City, or Local Tax Department

NAVIGATE TO HEALTH INSURANCE



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REPORT BEN'S HEALTH INSURANCE SITUATION

Ben did not purchase health insurance from the MNsure marketplace.

Affordable Care Act Insurance Plans

BACK

CONTINUE

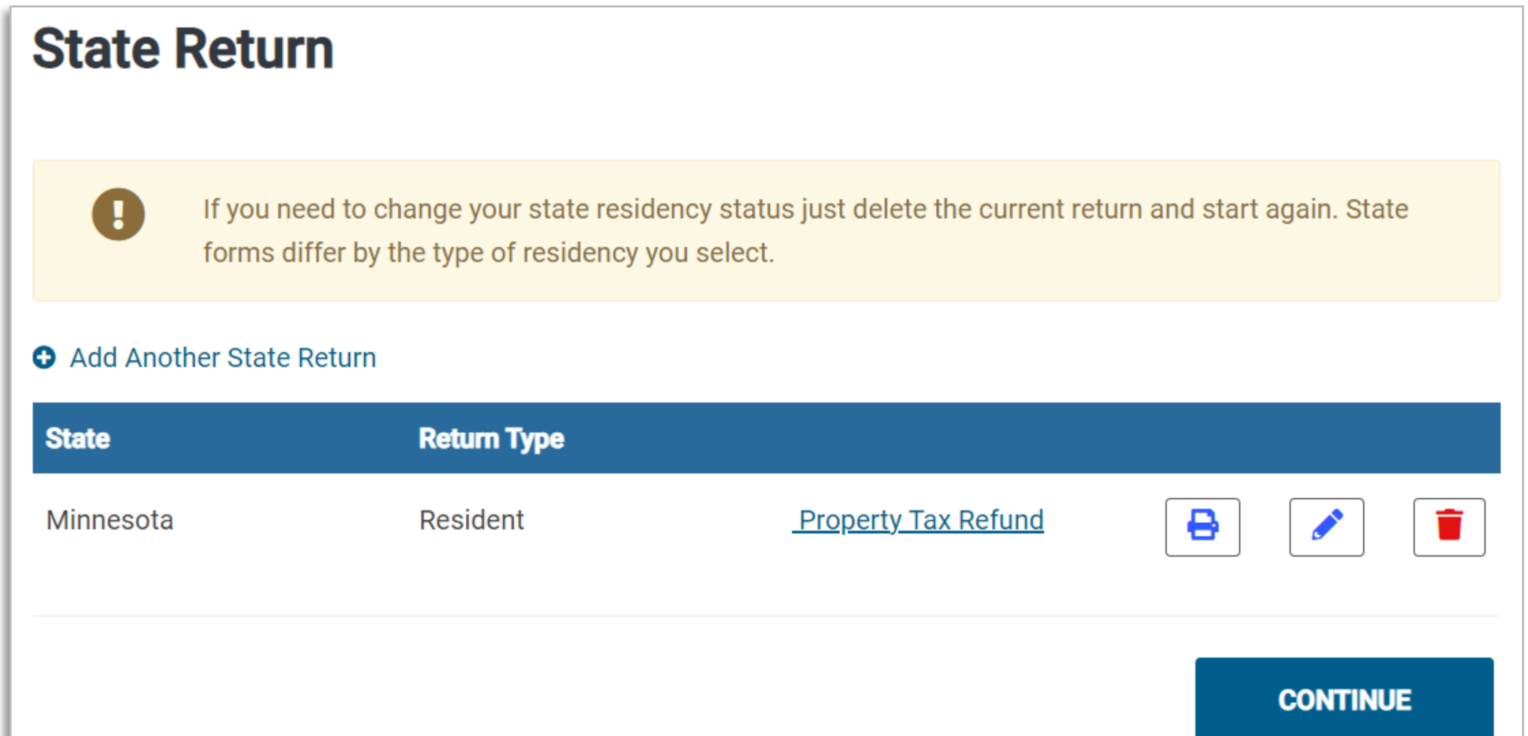
Reported on Form 1095-A

Did you, your spouse, or a dependent have insurance under the Affordable Care Act?*
If so, select Yes – you must report Form 1095-A for the IRS to accept your return. If you did not have an Affordable Care Act insurance plan, select No.

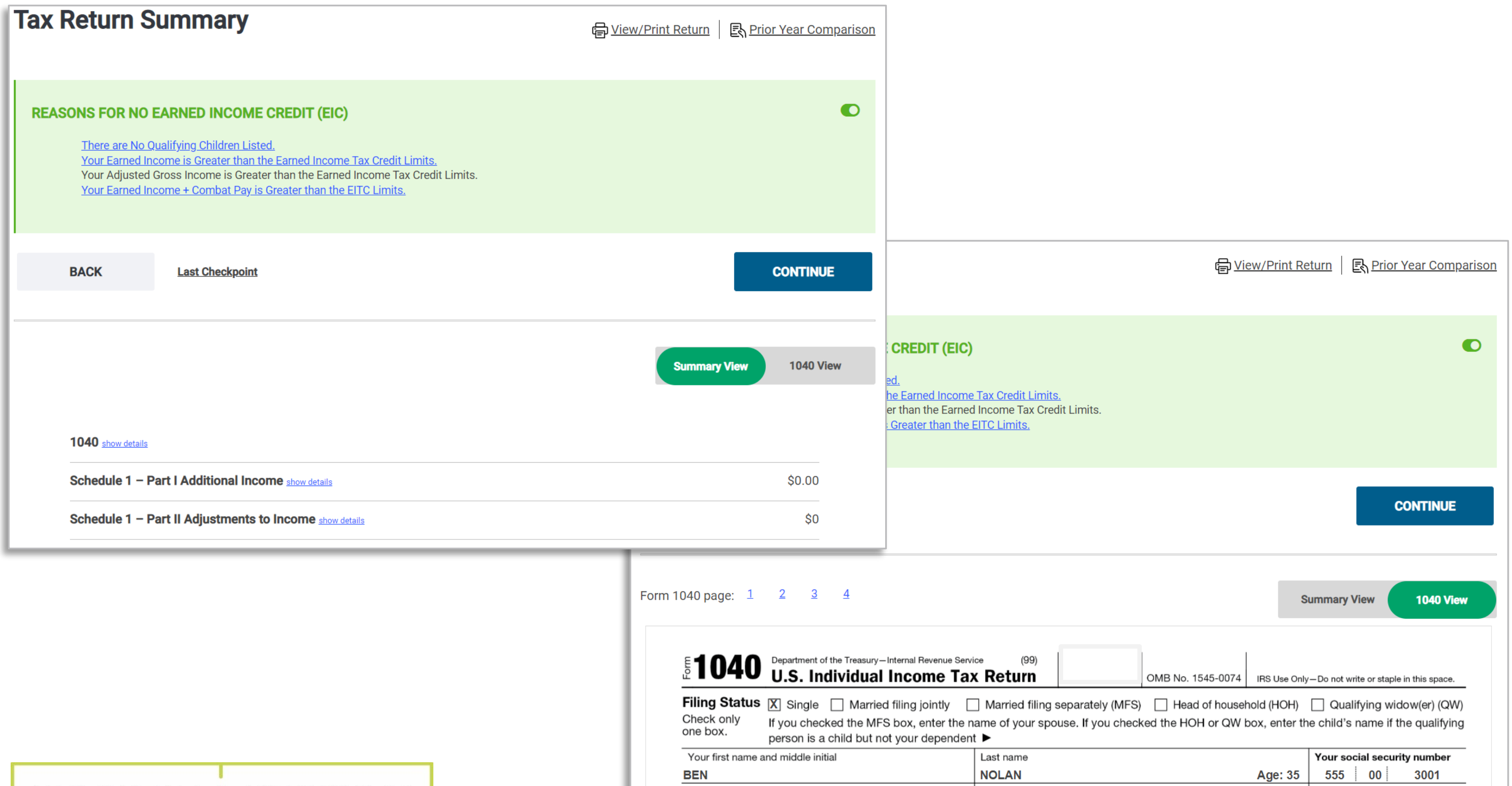
- ○ Yes
- ◉ No

CONFIRM BEN'S MN RETURN

Ben will file a state return and no special situations apply, and TaxSlayer transfers all the information needed for the Minnesota return.

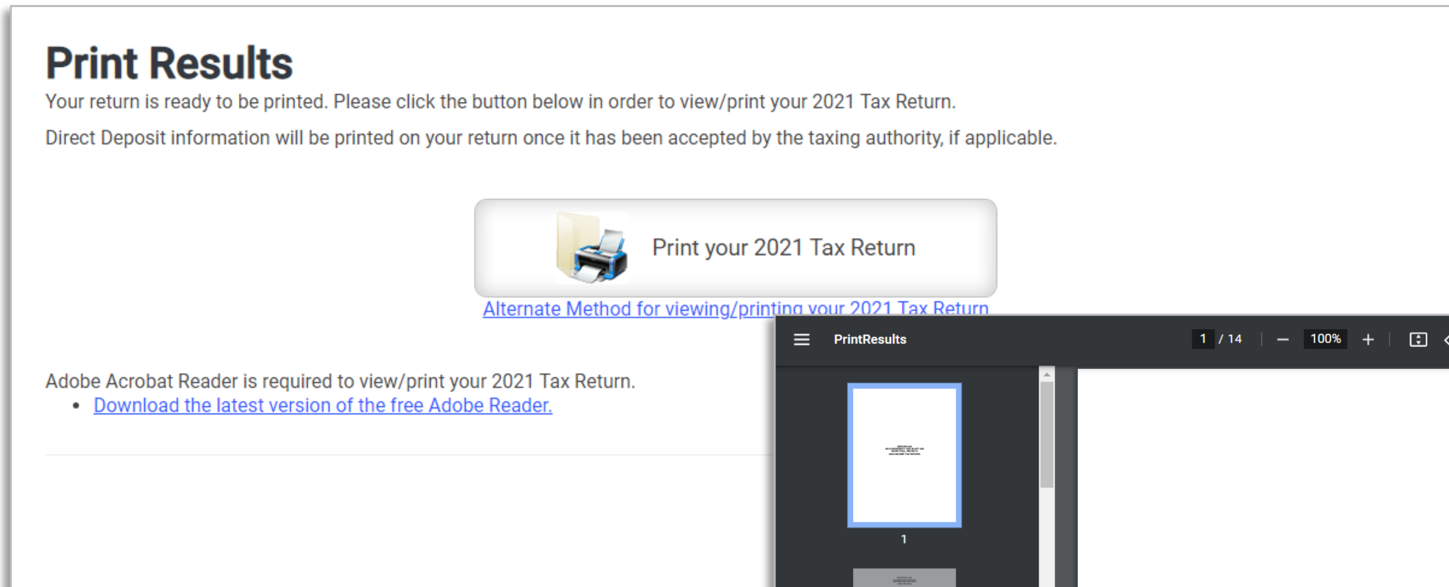


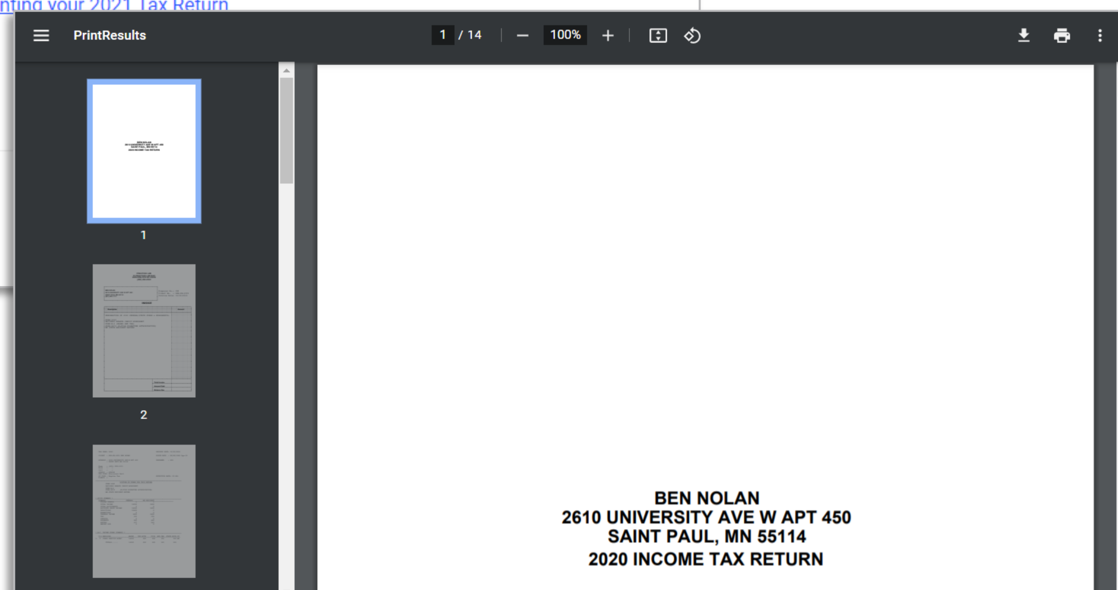
VIEW BEN'S RETURN SUMMARY



PREPARE + PROSPER

PRINT A PDF OF BEN'S RETURN





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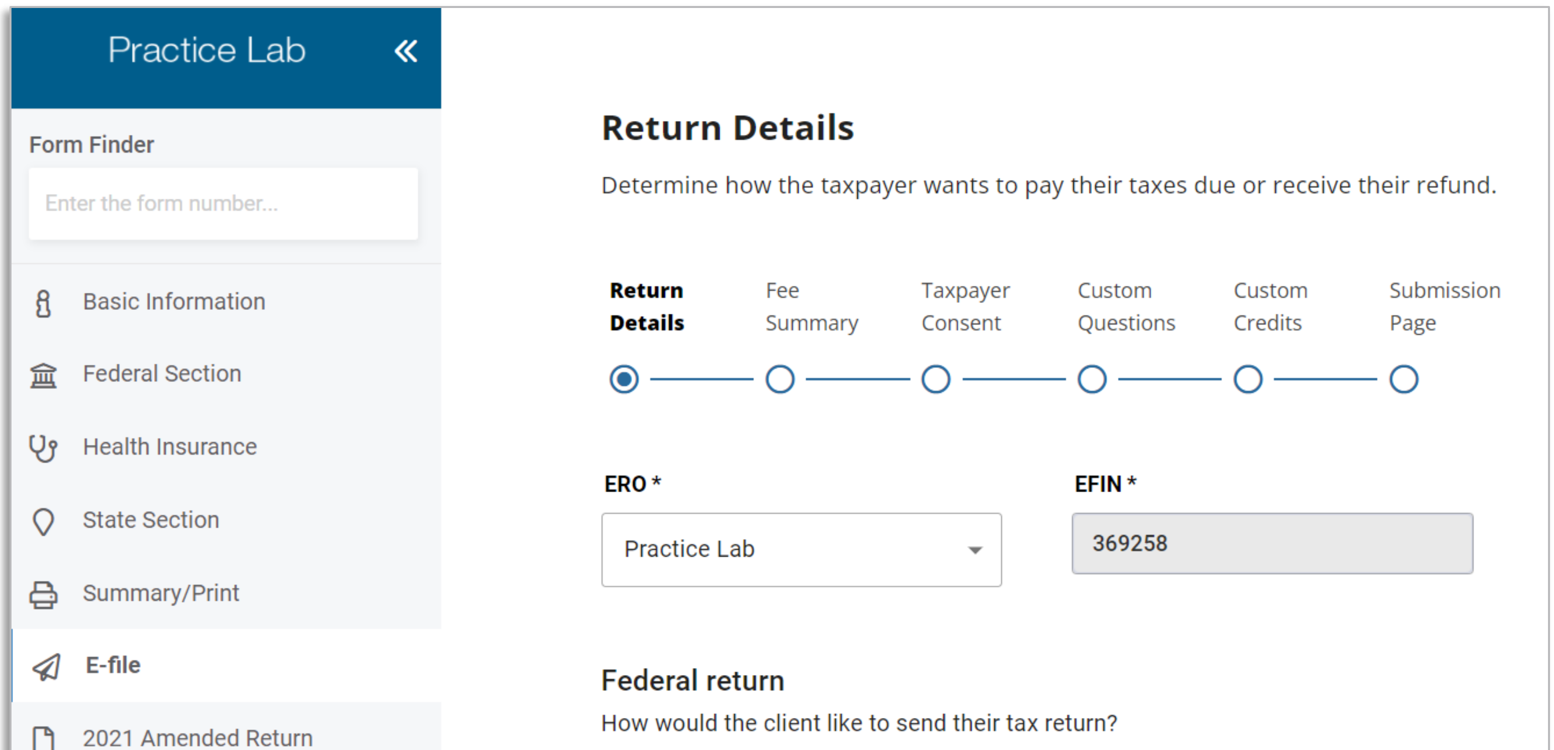
START THE E-FILE SECTION OF BEN'S RETURN

The next section of the return is the E-file Section. We'll cover these details in the Basic E training!



EXTRA NOTES ABOUT TAXSLAYER

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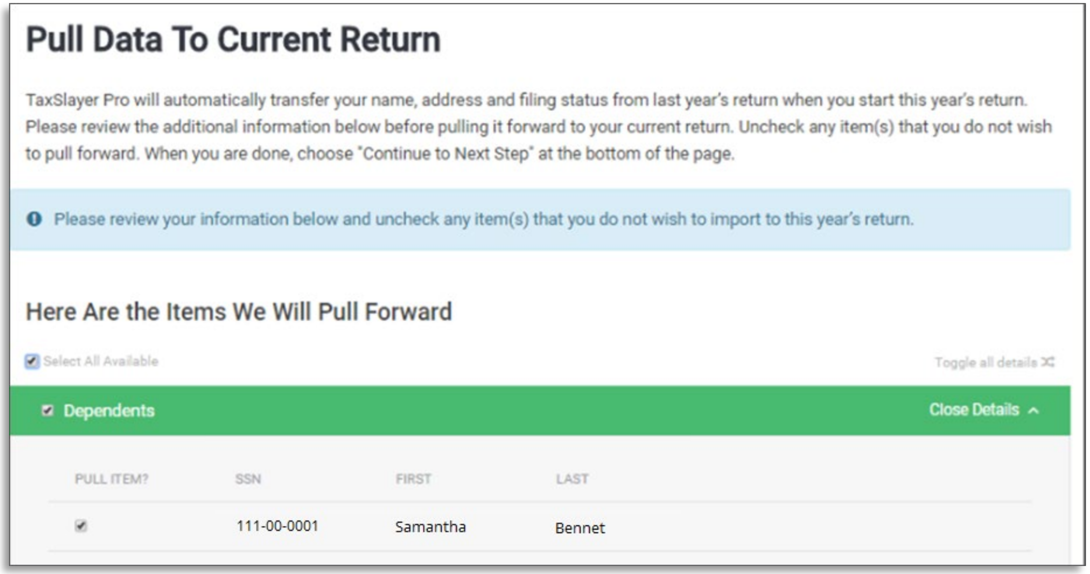
CARRY FORWARD DATA

- Available for returning customers
- Copies basic data from previous year to the current year return
- Streamlines tax preparation with less data entry



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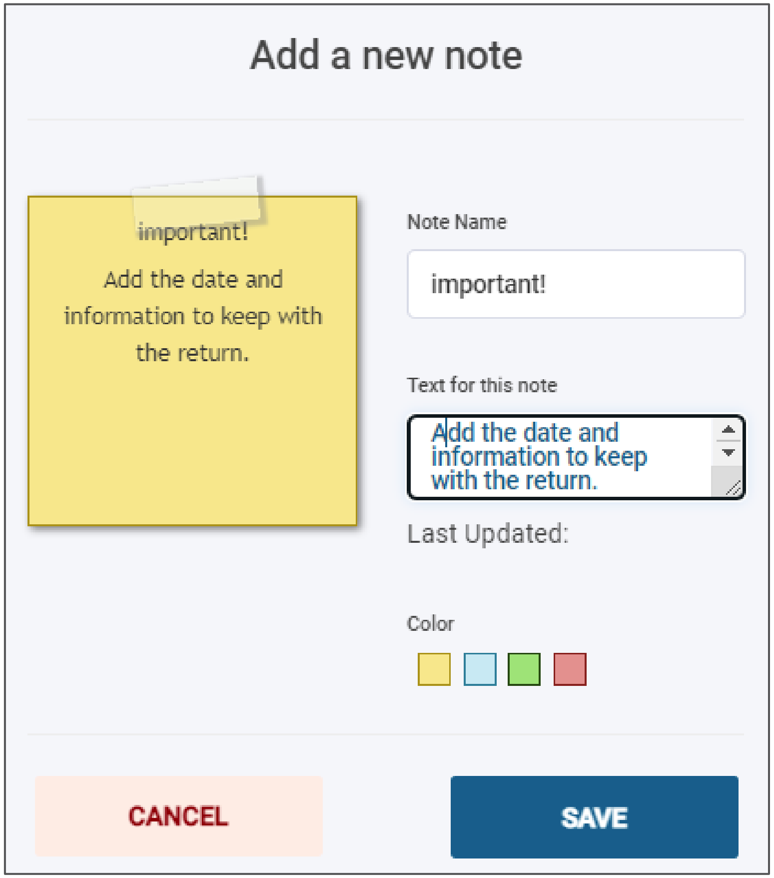
TAXSLAYER STICKY NOTE

- Put most notes directly on the intake paperwork
- TaxSlayer notes are helpful for situations that cross over between tax years
- Make sure to add the date to notes



TAXSLAYER RESOURCES

- P+P volunteer manual
  - Pages 20-37
  - Throughout for specific tax topics
- Publication 4012
  - Tab O
  - Throughout for specific tax topics
- TaxSlayer search menu
- Managers
- Other volunteers

MORE TAXSLAYER PRACTICE

- Software Lab
  - Final required part of training for new volunteers
  - Several sample returns and an answer key

- Practice on your own
  - Be creative! Make up your own taxpayer scenarios.
  - TaxSlayer Practice Lab has scenarios available for download to help you practice.

WRAP UP

NEXT STEPS AFTER BASIC A

- Start another tax return for more practice
- Check out your resources
  - Flip through Pub 4012, P+P volunteer manual, and Form 6744
- View self-paced online courses
  - preapareandprosper.moodlecloud.com
- Attend Basic B: Filing Status & Dependents

THANK YOU!

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