



BASIC A: TAX RETURN BASICS TAX YEAR 2024

In the Chat:

- **Share your name (and pronouns if you want)**
- **What site will you be volunteering at?**
- **How did you get connected to 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: Renters, Homeowners, and Finishing a Return

- Software Lab: Practice return preparation with TaxSlayer



BASIC A OVERVIEW



P+P overview



Tax return crash course



Introduction to TaxSlayer



GOALS: BY THE END YOU WILL

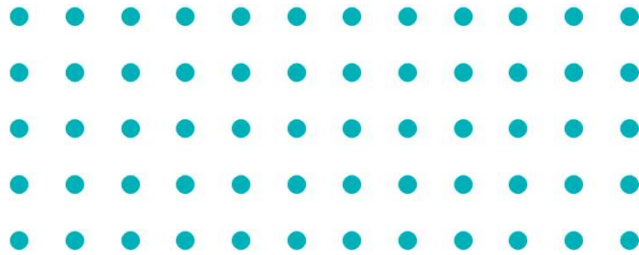
- Understand the work of Prepare + Prosper and the VITA program
- Get an introduction to (or review of) important tax terminology
- Log into the TaxSlayer Practice Lab
- Know how to start a new return in TaxSlayer



WHAT WE DO—AND WHY!

PREPARE + PROSPER

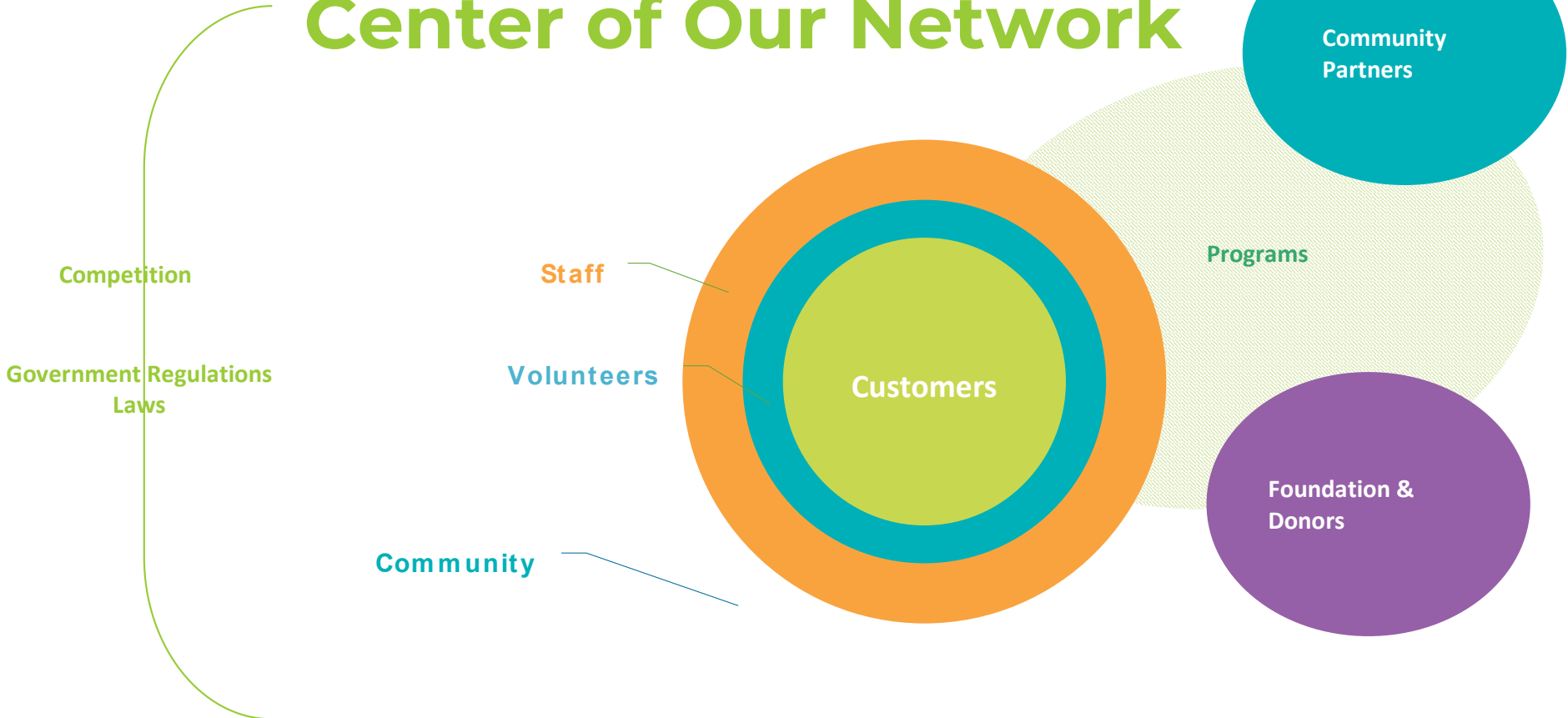




Customer-centric

PREPARE + PROSPER

Customers are at the Center of Our Network



P+P Customers



Over 50% are
BIPOC

40% are living
with or caring for
someone with a
disability

20% are aging
community
members

Many are
otherwise
underserved

Average income
for tax prep
customers is
\$18,903

Suyapa Miranda

Executive Director



Suyapa is the first Woman of Color to lead our organization. Her leadership style reflects her personal values: growth, innovation, and a deep commitment to social justice and equity. From creating our systems change program, to integrating culturally-specific programming into our organization, Suyapa has been focused on breaking down barriers and reaching the people who need our services the most.

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 \$2 million in tax preparation fees by using a free service in 2024
- IRS Volunteer Income Tax Assistance program operates nation-wide



PREPARE + PROSPER

FINANCIAL SERVICES & REFERRALS

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

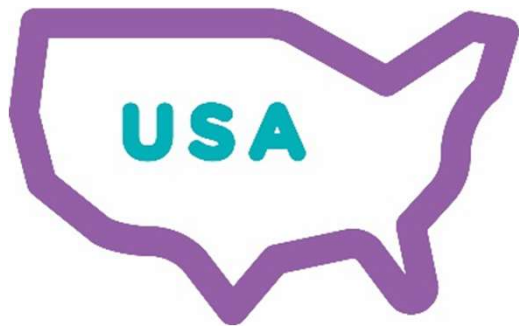




POLL BREAK!

PREPARE + PROSPER

P+P TAX RETURN CRASH COURSE



PREPARE + PROSPER

RETURNS WE DO

Form 1040 U.S. Individual Income Tax Return 2019

Department of the Treasury—Internal Revenue Service

Filing Status: Single Married filing jointly Married filing separately (MFS) Head of household (HOH) Qualifying widow(er) (QW)

Check only one box. If you checked the MFS box, enter the name of spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent.

Your first name and middle initial: _____ Last name: _____ Your social security number: _____

If joint return, spouse's first name and middle initial: _____ Last name: _____ Spouse's social security number: _____

Home address (number and street): _____ Apt. no.: _____ Presidential Election Campaign: _____

City, town or post office, state, and ZIP code: _____

Foreign country name: _____ Foreign province/state/country: _____ Foreign postal code: _____

Standard Deduction: Someone can claim you as a dependent You as a dependent Your spouse as a dependent Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness: Yes No Were born before January 2, 1955 Are blind Spouse: Was born before January 2, 1955 Is blind

Dependents (see instructions):

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) ✓ if qualifies for (see instructions): Child tax credit	Credit for other dependents

1 Wa
2a Tax
3a Oti
4a IRA
5a Per
6 Chi
7a Chi

Standard Deduction for—
• Single or Married Filing Separately: \$12,000
• Married Filing Jointly or Qualifying Widow(er): \$24,000

Form 1040: Federal Individual Income Tax Return

m DEPARTMENT OF REVENUE

2019 Form M1, Individual Income Tax

Leave unused boxes blank. Do not use staples on anything you submit.

Your First Name and Initial: _____ Last Name: _____ Your Social Security Number (SSN): _____ Your Date of Birth: _____

If a Joint Return, Spouse's First Name and Initial: _____ Spouse's Last Name: _____ Spouse's Social Security Number: _____ Spouse's Date of Birth: _____

Current Home Address: _____ City: _____ State: _____ ZIP Code: _____

Check if: New Address Foreign Address

2019 Federal Filing Status (place an X in one box):

(1) Single (2) Married filing jointly (3) Married filing separately (4) Head of household (5) Qualifying widow(er)

Spouse name and SSN: _____

State Elections Campaign Fund

If you want \$5 to go to help candidates for state offices pay campaign expenses, enter the code number for the party of your choice. This will not increase your tax or reduce your refund.

Your Code: _____ Spouse's Code: _____ Political Party Code Numbers: _____

A. Wages, salaries, tips, etc. B. IRA, pensions, and annuities C. Unemployment D. Federal taxable income

1 Federal adjusted gross income (if a negative amount) _____

2 Additions to Minnesota _____

3 Add lines 1 and 2 (if a negative amount) _____

Form M1: Minnesota Individual Income Tax Return

m DEPARTMENT OF REVENUE

2019 Form M1PR, Homestead Credit Refund (for Homeowners) and Renter's Property Tax Refund

Your First Name and Initial: _____ Last Name: _____ Your Social Security Number: _____ Your Date of Birth: _____

If a Joint Return, Spouse's First Name and Initial: _____ Spouse's Last Name: _____ Spouse's Social Security Number: _____ Spouse's Date of Birth: _____

Current Home Address: _____ City: _____ State: _____ ZIP Code: _____

Check if: New Address Foreign Address

Place an X in boxes that apply:

Renter Homeowner Nursing Home or Adult Foster Care Resident Mobile Home Owner

State Elections Campaign Fund

If you want \$5 to go to help candidates for state offices pay campaign expenses, enter the code number for the party of your choice. This will not increase your tax or reduce your refund.

Your Code: _____ Spouse's Code: _____ Political Party Code Numbers: _____

1 Federal adjusted gross income (from line 1 of Form M1, see instructions if you did not file Form M1) _____

2 Nontaxable Social Security and/or Railroad Retirement Board benefits received and not included in line 1 above (determine from instructions) _____

3 Deduction for contributions to a qualified retirement plan (add lines 15 and 19 of Federal Schedule 1; see instructions) Also see line 9 of this Form M1PR _____

4 Total payments from programs including MFIP (MN Family Investment Program), MSA (MN Supplemental Aid), SSI (Supplemental Security Income) _____

5 Additional nontaxable _____

6 Add lines 1 through 5 _____

7 Subtraction for 65 _____

If you (or your spouse) are a resident of Minnesota, check the box if you are a resident of Minnesota for purposes of the Homestead Credit Refund _____

Form M1PR: Minnesota Property Tax Refund

PREPARE + PROSPER

SCOPE OF SERVICE

SCOPE OF SERVICE

VITA sites nationwide have a shared scope of service. Preparing returns that are out of scope violates the VITA Volunteer Standards of Conduct. Use the scope charts, the taxpayer's intake forms, and the tax interview to verify that a return is in scope and matches the volunteer's certification level.

Pub 4012 (pages vi through xxi) has an extensive chart of the chart in Pub 4012 if the P+P manual is unclear. P+P below, that require an appointment with specific volunteers.

P+P income guidelines

Income is \$40,000 or less for a single taxpayer with no dependents

Income is \$70,000 or less for a married or single taxpayer with dependents, or taxpayers with self-employment income (see next chart section, below)

Income is over limits stated above
(check with site manager for exceptions)

Self-employment income

Self-employment income is from:

- Driving a taxi cab
- Acting as a clergy member
- Farming or hobbies
- Rental property
- Day trading
- Participating in a corporation or partnership
- Owning a business with employees

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(schedule) 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: <ul style="list-style-type: none"> • held no virtual currency for the tax year or if the taxpayer's only transactions 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 control 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

P+P INCOME GUIDELINES

\$40,000 or less for single taxpayer

\$70,000 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





POLL BREAK!



ZOOM QUIZ: TAX TERMS MATCH UP





RESOURCES AND IRS CERTIFICATION

PREPARE + PROSPER

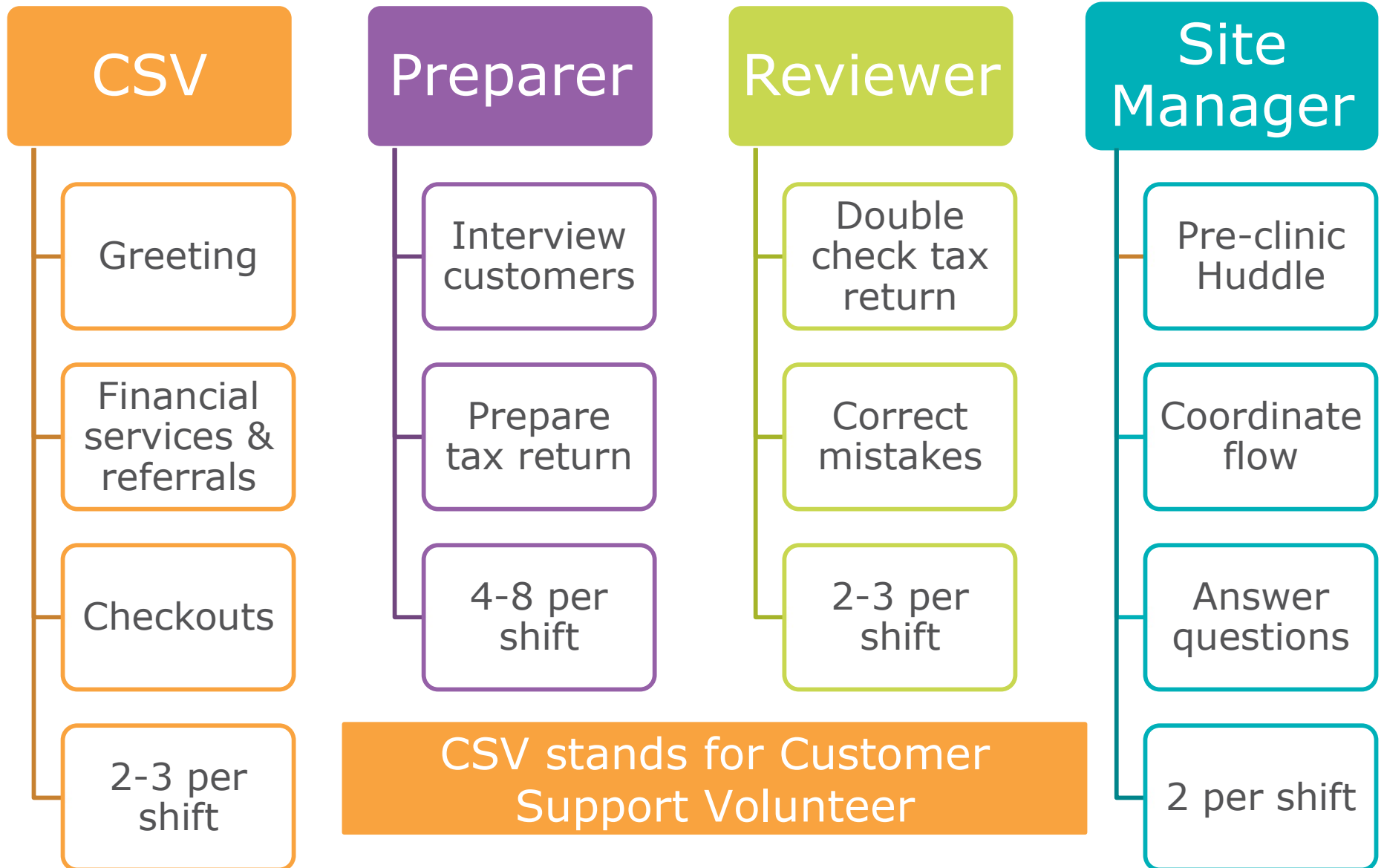


PEOPLE RESOURCES

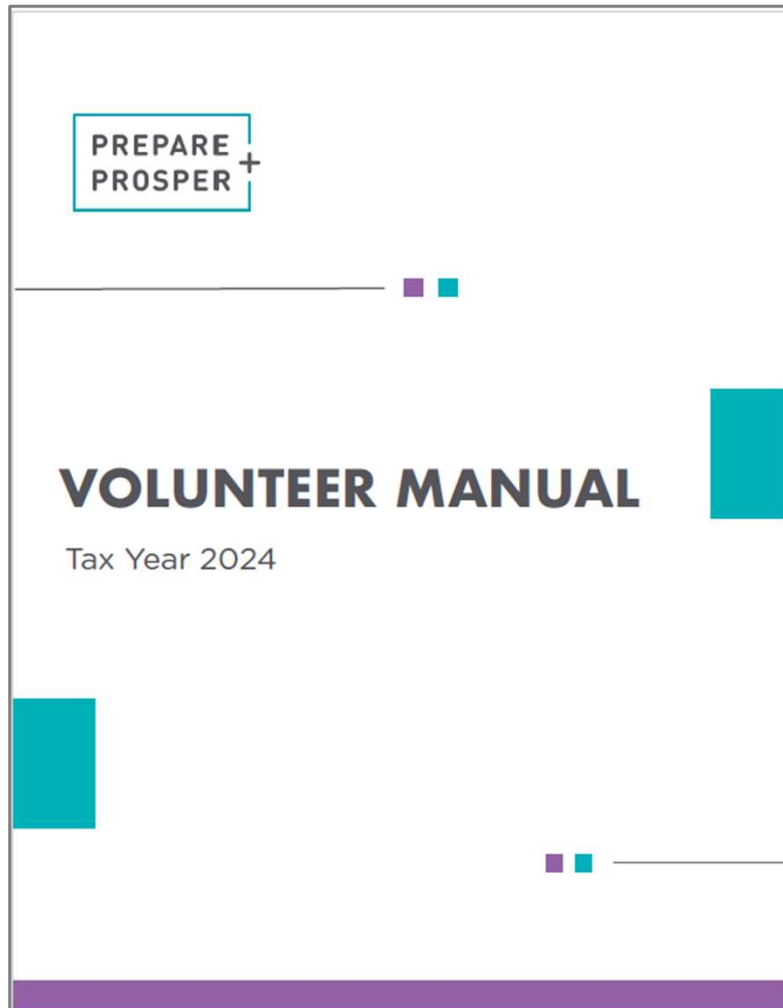
- Managers and experienced volunteers can help:
 - Answer tax questions
 - Troubleshoot TaxSlayer problems
 - Help with procedural issues
- Managers coordinate the flow of tax clinics
 - Kick off with a team Huddle
 - Ensure things are on track throughout the shift



KNOW YOUR TEAM

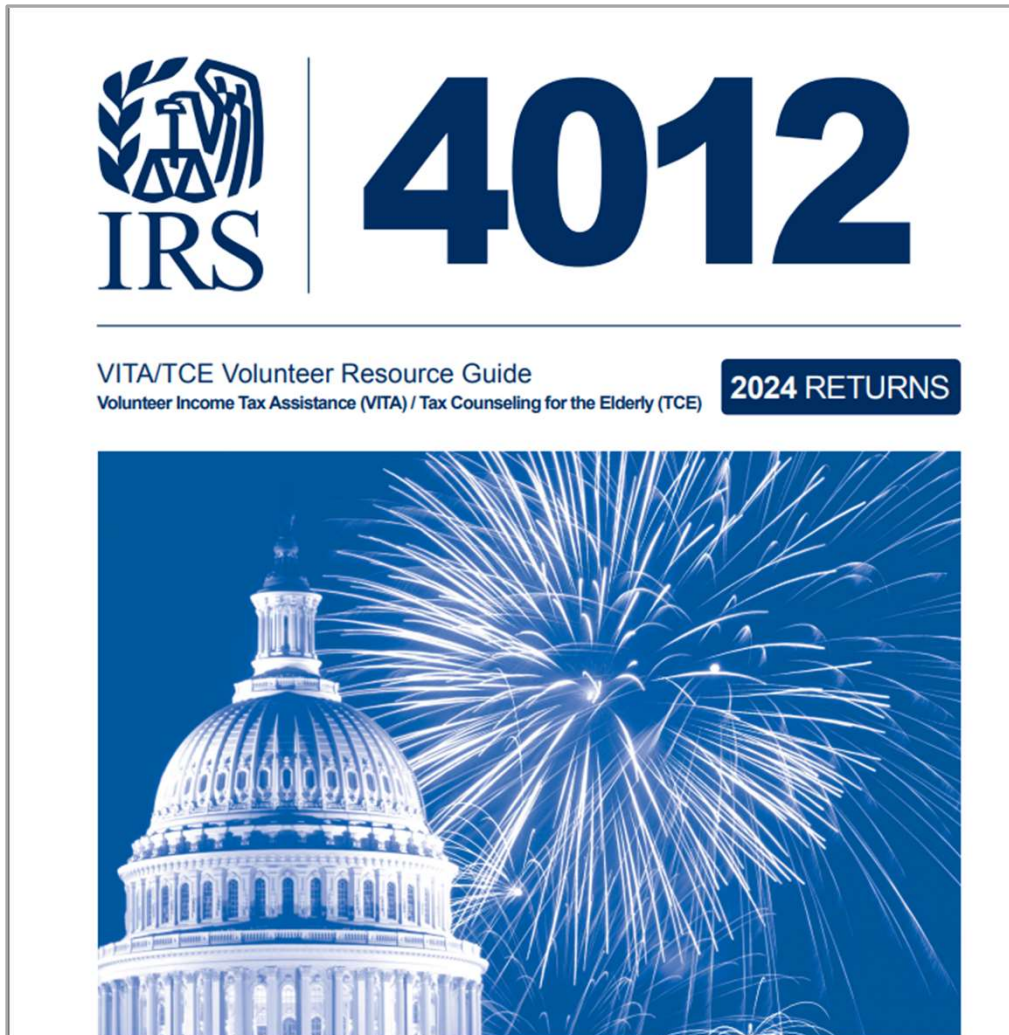


RESOURCES: MANUALS AND PUBS



- Combines federal and Minnesota tax law
- Provides software instructions
- Available virtually on the P+P volunteer training site

PUB 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

BASIC VS ADVANCED CERTIFICATION

Basic

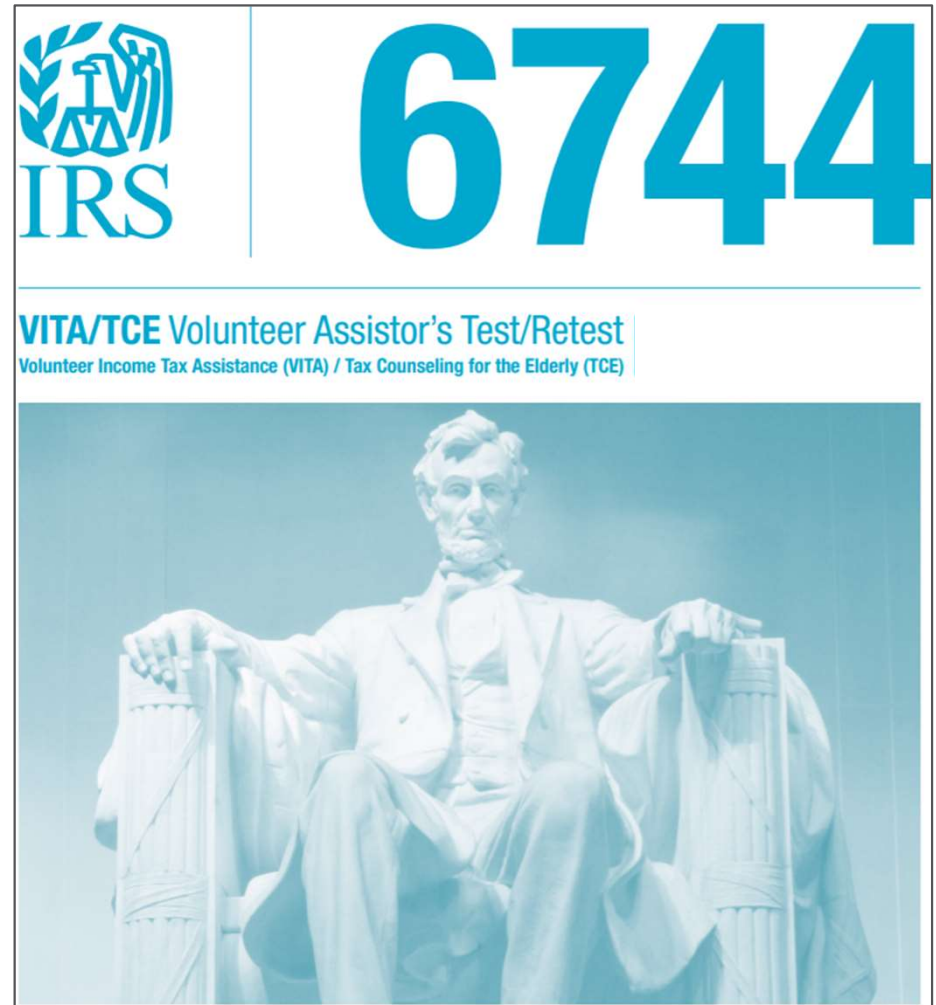
- Filing status and dependents
- W2, interest and dividend incomes
- Some retirement income
- Education credits
- Minnesota topics

Advanced

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

IRS CERTIFICATION TESTS

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



1. TEST ON 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





2. TEST ON INTAKE/INTERVIEW & QUALITY REVIEW

- **Intake:** ID and Social Security number or ITIN documentation must be viewed
- **Interview:** Preparer uses intake paperwork to do a detailed tax interview
- **Quality review:** All returns are reviewed by a volunteer who did not prepare the return

3. TEST ON BASIC TAX PREPARATION

- 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

IRS TEST VERIFICATION

- After testing, Email Form 13615, to volunteer@prepareandprosper.org
- Signing this form confirms you will follow the Volunteer Standards of Conduct
- Download form from the testing website

Form 13615 (October 2023)	Department of the Treasury - Internal Revenue Service
Volunteer Standards of Conduct Agreement – VITA/TCE Programs	
<p>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.</p> <p>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.</p> <p>Standards of Conduct: As a volunteer in the VITA/TCE programs, you must adhere to the following Volunteer Standards of Conduct:</p>	
<p>VSC #1 - Follow all Quality Site Requirements (QSR).</p> <p>VSC #2 - Do not accept payment, ask for donations, or accept refund payments for federal or state tax return preparation from customers.</p> <p>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.</p>	<p>VSC #4 - Do not knowingly prepare false returns.</p> <p>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.</p> <p>VSC #6 - Treat all taxpayers in a professional, courteous, and respectful manner.</p>
<p>Failure to comply with these standards could result in, but is not limited to, the following:</p> <ul style="list-style-type: none"> • 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 	
<p>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.</p> <p>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.</p> <p>For additional information on the volunteer standards of conduct, please refer to Publication 4961, Volunteer Standards of Conduct - Ethics Training.</p>	
<p>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.</p> <p>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.</p> <p>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.</p>	
Catalog Number 38847H	www.irs.gov
Form 13615 (Rev. 10-2023)	

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



PREPARING A CUSTOMER'S RETURN

PREPARE + PROSPER





PREPARER STEPS

1. Introduce yourself and make small talk to put the customer at ease
2. Go over the process
3. Intake paperwork and document review
Go over their paperwork; help them finish it
Review all of the documents they brought with
4. Conduct the taxpayer interview
Using the paperwork
5. Finally, start entering data into TaxSlayer



GROUP QUESTIONS

1. What are ways you can break the ice with the customer at the beginning of their appointment?
2. Our customers will want you to be confident in what you're doing. AND our reviewers and site managers will want you to ask questions! **How will you balance confidence and humility?**



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 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



15-MIN BREAK – BUT FIRST CREATE YOUR PRACTICE LAB ACCOUNT

- Laptop passwords are 2023Taxesrock!
- Go to: vita.taxslayerpro.com/IRSTraining
- Enter Practice Lab password: **TRAINPROWEB**
 1. Create username and password
(Note: some special characters are not allowed)
 2. Select **VITA** as the program type
 3. Skip the **SIDN** entry
 4. Set a password recovery question and answer
- Sign in with your account and click the “Go to Practice Area” button.

TAXSLAYER TIP: 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



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.

PREPARE + PROSPER



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 2024.**

BUT TODAY we will use the software for 2023 (2024 isn't fully functional yet).



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.

2222		Employer's social security number 111-00-3001		OMB No. 1545-0048	
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 Employer's first name and initial Last name Ben Nolan 2610 University Ave W, Apt 450 St. Paul, MN 55114		11 Nonqualified plans		12a	
		13 Voluntary income		12b	
		14 Other		12c	
f Employer's address and ZIP code				12d	
15 State MN	Employer's state ID number 8888888	16 State wages, tips, etc. 16,000	17 State income tax 300	18 Local wages, tips, etc.	19 Local income tax
				20 Locality name	

Form **W-2** Wage and Tax Statement
Copy 1—For State, City, or Local Tax Department

2023

Department of the Treasury—Internal Revenue Service

PREPARE + PROSPER



LET'S GET STARTED WITH TAXSLAYER

PREPARE + PROSPER



TAXSLAYER OFFICE

The screenshot displays the TaxSlayer Office interface. On the left is a sidebar menu with the following items: Main Menu, Client Status, IRS website, IRS Mailing Addresses, IRS Publications, Instructions, and Fill-In Forms, Release Notes, and VITA/TCE Blog. The top navigation bar shows '2024 Tax Program', 'Current User: IRS', a 'Change Tax Year' dropdown menu, and a 'Logout' button. The dropdown menu is open, showing '2024' and '2023' as options. The main content area features a 'Welcome to The Practice Lab' heading, a 'Message Center' button with a '2' notification, and a 'Rejected Clients' button. Below these are two highlighted action boxes: 'Start New Tax Return' (with a 'Select' button) and 'Client Search' (with a 'Select' button').

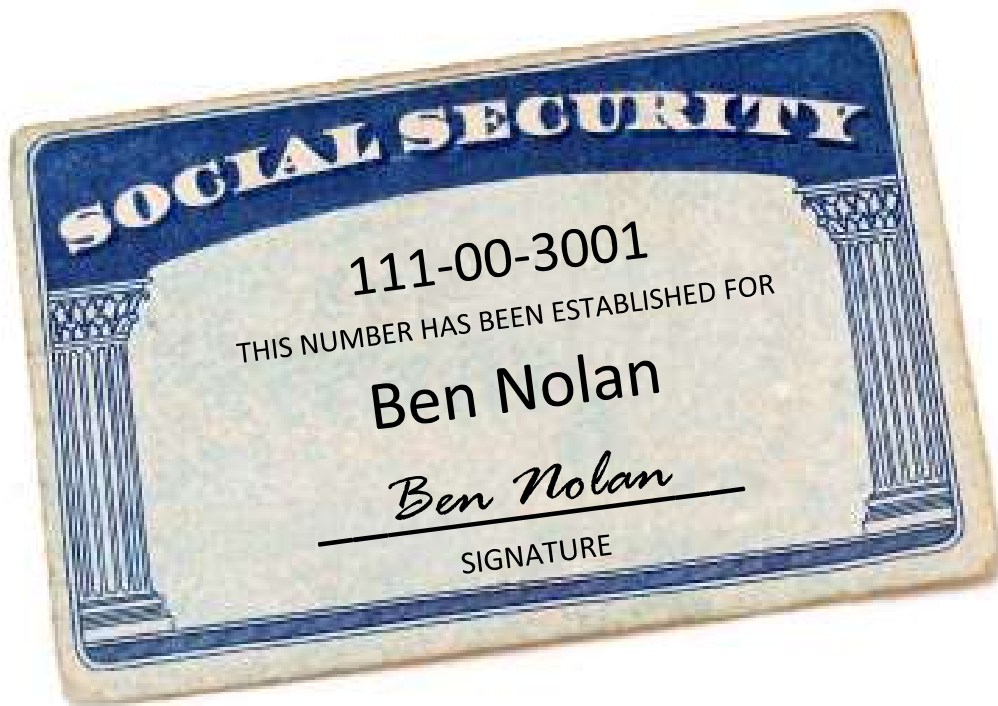
START BEN'S RETURN

- Choose "Change Tax Year" and select 2023
- Click Start New Tax Return

The screenshot shows the top navigation bar with 'Current User: IRS', 'Change Tax Year' (with a dropdown arrow), and 'Logout' (with an external link icon). The dropdown menu is open, showing '2024' and '2023', with an orange arrow pointing to '2023'. Below the navigation bar, the main content area is titled 'Welcome to The Practice Lab'. It features two buttons: 'Message Center' with a '2' notification badge and 'Rejected Clients'. Below these are two main sections: 'Start New Tax Return' with a description 'Create a brand new tax return for a client.' and a 'Select' button, and 'Client Search' with a description 'Edit returns you previously started.' and a 'Select' button. A green arrow points to the 'Select' button under 'Start New Tax Return'.

ENTER BEN'S SSN

Ben provides his Social Security card to verify his number.

A screenshot of a tax software interface. The window title is "Enter Social Security Number". It has a close button (X) in the top right corner. The form contains two sections: "Enter Social Security Number" and "Available Taxpayer Profiles".
In the "Enter Social Security Number" section, there are two rows of input fields. The first row is for the Social Security Number, with the first three digits masked as "...", followed by a hyphen, "00", another hyphen, and the last four digits masked as "....". The second row is for the "Confirm Social Security Number", with the first three digits masked as "...", followed by a hyphen, "00", another hyphen, and the last four digits entered as "1111".
The "Available Taxpayer Profiles" section is a scrollable list of options, each with a right-pointing arrow icon:

- Basic (No Profile) - Create a return without a Taxpayer Profile.
- RETIREMENT
- ITEMIZED DEDUCTIONS
- RENTAL PROPERTY
- Master Profile - IRS Guidelines: This profile will automatically display

At the bottom right of the form is a blue button labeled "Start Return".

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.

What's your filing status?

Single

Married Filing Jointly

Married Filing Separately

Head of Household

Qualifying Widow(er) with Dependent Children

Nonresident Alien

Need help determining your filing status?

FILING STATUS WIZARD

BACK **CONTINUE**

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

PREPARE + PROSPER

Form 13614-C (October 2021)		Department of the Treasury - Internal Revenue Service Intake/Interview & Quality Review Sheet			OMB Number 1545-1964	
You will need: <ul style="list-style-type: none">• 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. <ul style="list-style-type: none">• 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 vi.volta@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. Nolan	Last name Nolan		Best contact number 651-000-1111	
2. Your spouse's first name		M.I.	Last name		Best contact number <input type="checkbox"/> Yes <input type="checkbox"/> 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: b. Totally and permanently disabled <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		a. Full-time student <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
7. Your spouse's Date of Birth		8. Your spouse's job title		9. Last year, was your spouse: b. Totally and permanently disabled <input type="checkbox"/> Yes <input type="checkbox"/> No		a. Full-time student <input type="checkbox"/> Yes <input type="checkbox"/> No c. Legally blind <input type="checkbox"/> Yes <input type="checkbox"/> No
10. Can anyone claim you or your spouse as a dependent? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Unsure						
11. Have you, your spouse, or dependents been a victim of tax related identity theft or been issued an Identity Protection PIN? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No						
12. Provide an email address (optional) (this email address will not be used for contacts from the Internal Revenue Service) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No						

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.

Minnesota Return

[CONTINUE](#)

You can choose to designate \$5 per taxpayer to the State Elections Campaign below. This designation does NOT reduce your refund or increase your tax.

If you would like to designate \$5 to the State Election Campaign, select your party of choice. If you choose the General Campaign fund, the \$5 will be distributed among the candidates of all major parties listed.

--Select--

[CONTINUE](#)

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**

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

PREPARE + PROSPER

The screenshot shows the 'Practice Lab' interface. At the top, there is a dark blue header with the text 'Practice Lab' and a hamburger menu icon. Below the header is a 'Form Finder' section with a search input field containing the placeholder text 'Enter the form number...'. The main navigation menu is displayed below the search field, featuring a list of categories with corresponding icons. The 'Federal Section' is currently expanded, showing sub-items: 'Income' (underlined), 'Deductions', 'Other Taxes', 'Payments & Estimates', 'Miscellaneous Forms', and 'COVID-19 Relief'. Other categories visible in the menu include 'Health Insurance', 'State Section', 'Summary/Print', 'E-file', and '2021 Amended Return'.

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.

Form Finder

Basic Information

Federal Section

- Income
- Deductions
- Other Taxes
- Payments & Estimates
- Miscellaneous Forms

Health Insurance

Income

Form W-2
Wage and Tax Statement [BEGIN](#)

Form 1099-G Box 2
State or local income tax refunds, credits, or offsets [BEGIN](#)

Schedule B - Forms 1099-INT, DIV, OID
Interest income, dividends, and distributions [BEGIN](#)

Form 1099-R, RRB, SSA
Distributions from pensions, annuities, retirement, IRAs, social security, etc. [BEGIN](#)

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			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.		11 Nonqualified plans		12a
Ben Nolan								DATA
2610 University Ave W, Apt 450		St. Paul, MN 55114		13 Statutory employee Retirement plan Third-party sick pay		12b		DATA
				<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				DATA
				14 Other		12c		DATA
						12d		DATA
f Employee's address and ZIP code								DATA
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				

NAVIGATE TO HEALTH INSURANCE

PREPARE + PROSPER

The screenshot shows a mobile application interface titled "Practice Lab" with a blue header and a hamburger menu icon. Below the header is a "Form Finder" section with a search input field containing the placeholder text "Enter the form number...". A list of navigation options follows, including "Basic Information", "Federal Section", "Income", "Deductions", "Other Taxes", "Payments & Estimates", "Miscellaneous Forms", "COVID-19 Relief", "Health Insurance", "State Section", "Summary/Print", "E-file", and "2021 Amended Return". The "Health Insurance" option is highlighted with an orange rectangular border.

Practice Lab

Form Finder

Enter the form number...

Basic Information

Federal Section

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Health Insurance

State Section

Summary/Print

E-file

2021 Amended Return

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.

State Return

 If you need to change your state residency status just delete the current return and start again. State forms differ by the type of residency you select.

[+ Add Another State Return](#)

State	Return Type				
Minnesota	Resident	Property Tax Refund			

[CONTINUE](#)

VIEW BEN'S RETURN SUMMARY

Tax Return Summary

[View/Print Return](#) | [Prior Year Comparison](#)

REASONS FOR NO EARNED INCOME CREDIT (EIC)

[There are No Qualifying Children Listed.](#)
[Your Earned Income is Greater than the Earned Income Tax Credit Limits.](#)
Your Adjusted Gross Income is Greater than the Earned Income Tax Credit Limits.
[Your Earned Income + Combat Pay is Greater than the EITC Limits.](#)

BACK | [Last Checkpoint](#) | **CONTINUE**

Summary View | 1040 View

1040 show details	
Schedule 1 – Part I Additional Income show details	\$0.00
Schedule 1 – Part II Adjustments to Income show details	\$0

[View/Print Return](#) | [Prior Year Comparison](#)

REASONS FOR NO EARNED INCOME CREDIT (EIC)

[There are No Qualifying Children Listed.](#)
[Your Earned Income is Greater than the Earned Income Tax Credit Limits.](#)
Your Adjusted Gross Income is Greater than the Earned Income Tax Credit Limits.
[Your Earned Income + Combat Pay is Greater than the EITC Limits.](#)

CONTINUE

Form 1040 page: 1 2 3 4

Summary View | **1040 View**

Form **1040** Department of the Treasury—Internal Revenue Service (99) OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

U.S. Individual Income Tax Return

Filing Status Single Married filing jointly Married filing separately (MFS) Head of household (HOH) Qualifying widow(er) (QW)
Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent ▶

Your first name and middle initial	Last name	Age: 35	Your social security number
BEN	NOLAN		555 00 3001

PREPARE + PROSPER

PRINT A PDF OF BEN'S RETURN

Print Results

Your return is ready to be printed. Please click the button below in order to view/print your 2021 Tax Return.

Direct Deposit information will be printed on your return once it has been accepted by the taxing authority, if applicable.

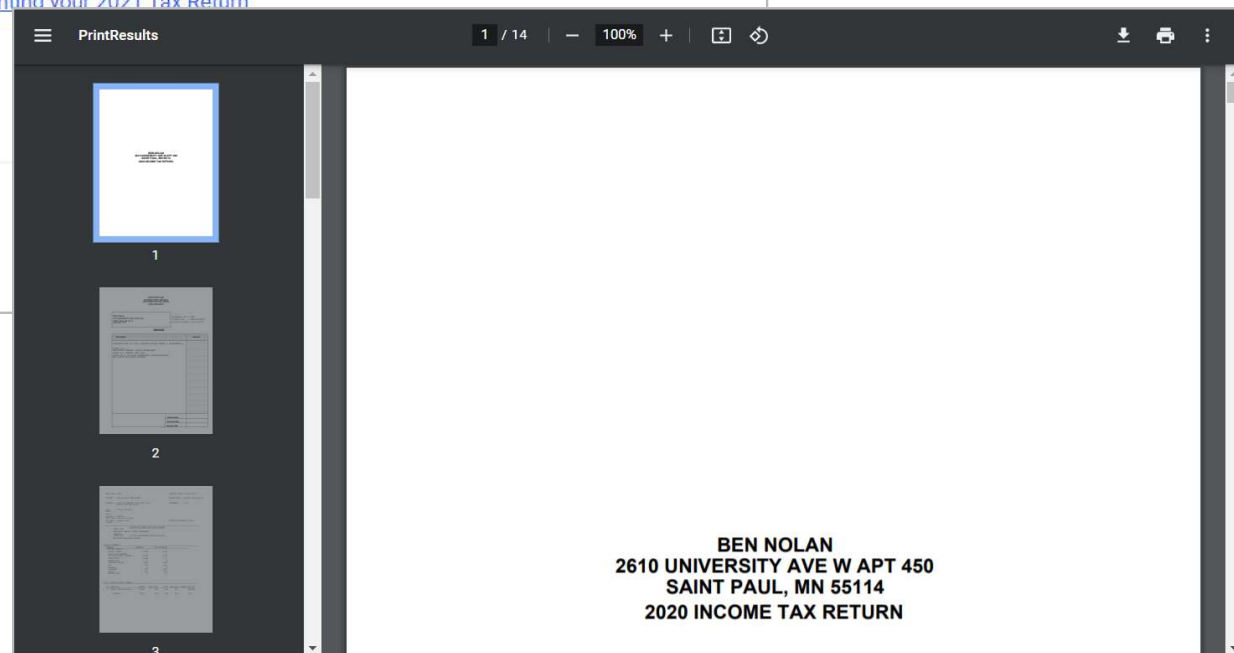


Print your 2021 Tax Return

[Alternate Method for viewing/printing your 2021 Tax Return](#)

Adobe Acrobat Reader is required to view/print your 2021 Tax Return.

- [Download the latest version of the free Adobe Reader.](#)



PREPARE + PROSPER

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!

The screenshot shows a software interface for tax preparation. On the left is a sidebar with a dark blue header labeled "Practice Lab" and a back arrow. Below the header is a "Form Finder" section with a text input field containing "Enter the form number...". The sidebar menu includes: "Basic Information" (with a person icon), "Federal Section" (with a building icon), "Health Insurance" (with a shield icon), "State Section" (with a location pin icon), "Summary/Print" (with a printer icon), "E-file" (with a paper plane icon), and "2021 Amended Return" (with a document icon). The main content area is titled "Return Details" and includes the instruction: "Determine how the taxpayer wants to pay their taxes due or receive their refund." Below this is a progress indicator with six steps: "Return Details" (selected with a filled circle), "Fee Summary", "Taxpayer Consent", "Custom Questions", "Custom Credits", and "Submission Page". Under "Return Details", there are two fields: "ERO*" with a dropdown menu showing "Practice Lab" and "EFIN*" with a text input field containing "369258". At the bottom, the section "Federal return" is visible with the question "How would the client like to send their tax return?"



EXTRA NOTES ABOUT TAXSLAYER

PREPARE + PROSPER



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

Pull Data To Current Return

TaxSlayer Pro will automatically transfer your name, address and filing status from last year's return when you start this year's return. Please review the additional information below before pulling it forward to your current return. Uncheck any item(s) that you do not wish to pull forward. When you are done, choose "Continue to Next Step" at the bottom of the page.

ⓘ Please review your information below and uncheck any item(s) that you do not wish to import to this year's return.

Here Are the Items We Will Pull Forward

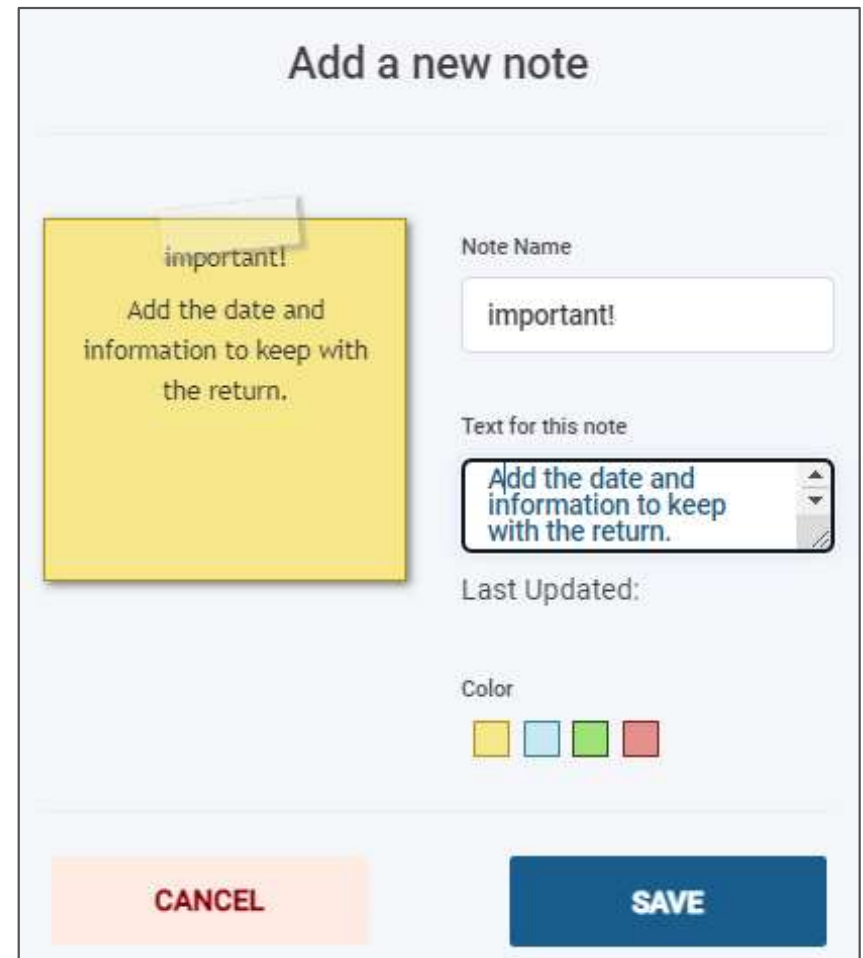
Select All Available Toggle all details ✕

Dependents Close Details ^

PULL ITEM?	SSN	FIRST	LAST
<input checked="" type="checkbox"/>	111-00-0001	Samantha	Bennet

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



Add a new note

important!
Add the date and information to keep with the return.

Note Name
important!

Text for this note
Add the date and information to keep with the return.

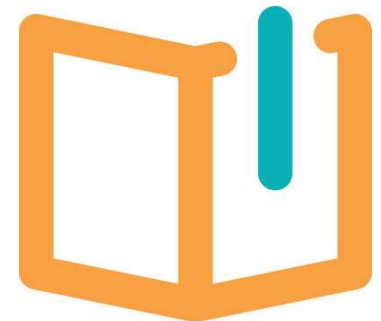
Last Updated:

Color
Yellow Light Blue Green Red

CANCEL **SAVE**

TAXSLAYER RESOURCES

- P+P volunteer manual
 - Pages 20-36
 - 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

PREPARE + PROSPER



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!

PREPARE + PROSPER

