VITA

VOLUNTEER INCOME TAX ASSISTANCE

Is that a VITA volunteer helping a taxpayer?

Be sure to mute your microphone until called on.

Be sure to turn your camera “off” until attendance is taken.

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VOLUNTEER INCOME TAX ASSISTANCE

Tax Year 2021
TAX LAW
PROGRAM TRAINING
Session 1

City of Phoenix VITA Network 2021

fppt.com

VITA

Cisco Webex Meetings

Gene Giesaking's Personal Room

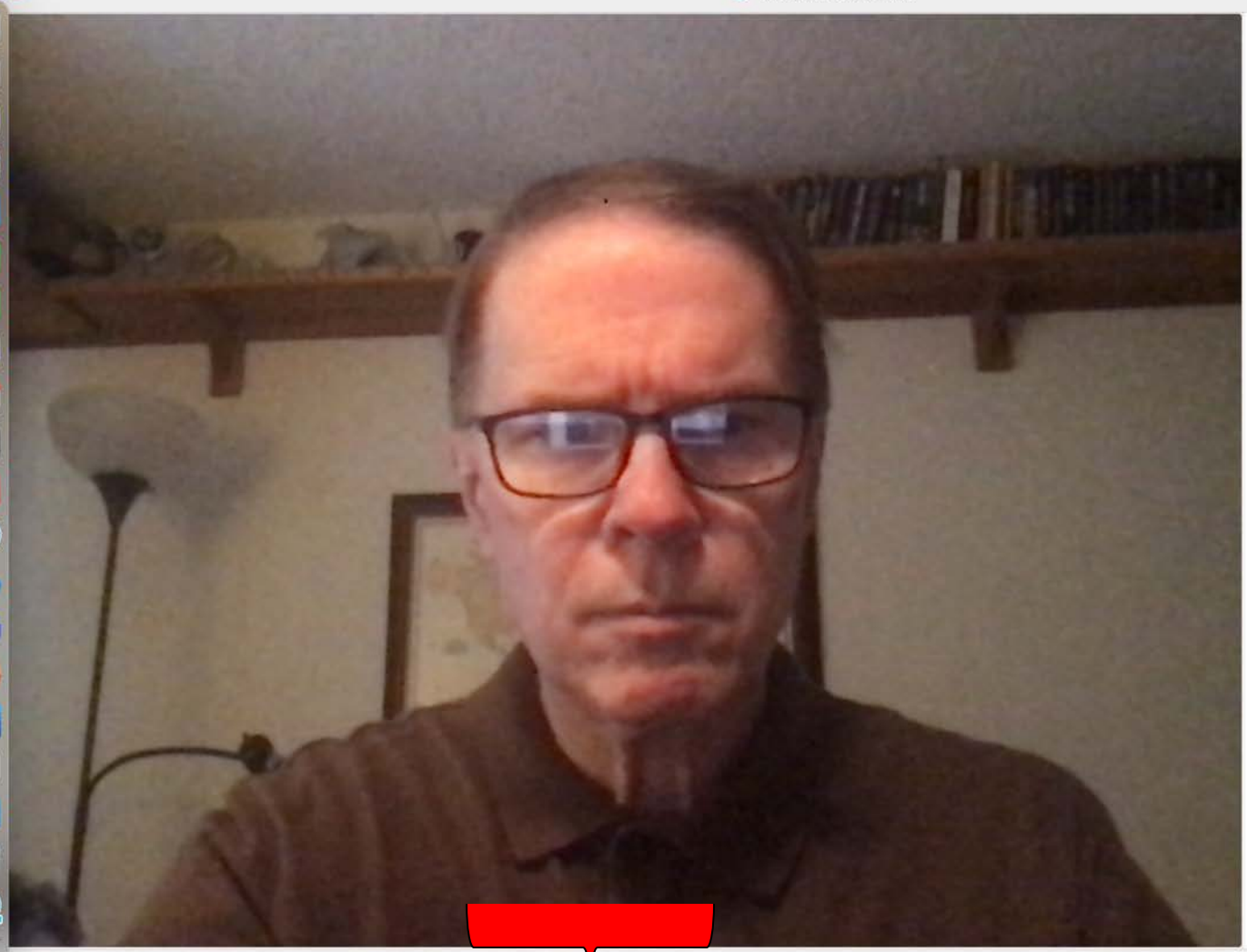
Unmute Stop video Start Meeting

VITA

Webex Meetings File Edit Share View Audio & Video Participant Meeting Breakout Sessions Window Help Mon Jan 4 4:12 PM

Cisco Webex Meetings

Meeting Info | Connected



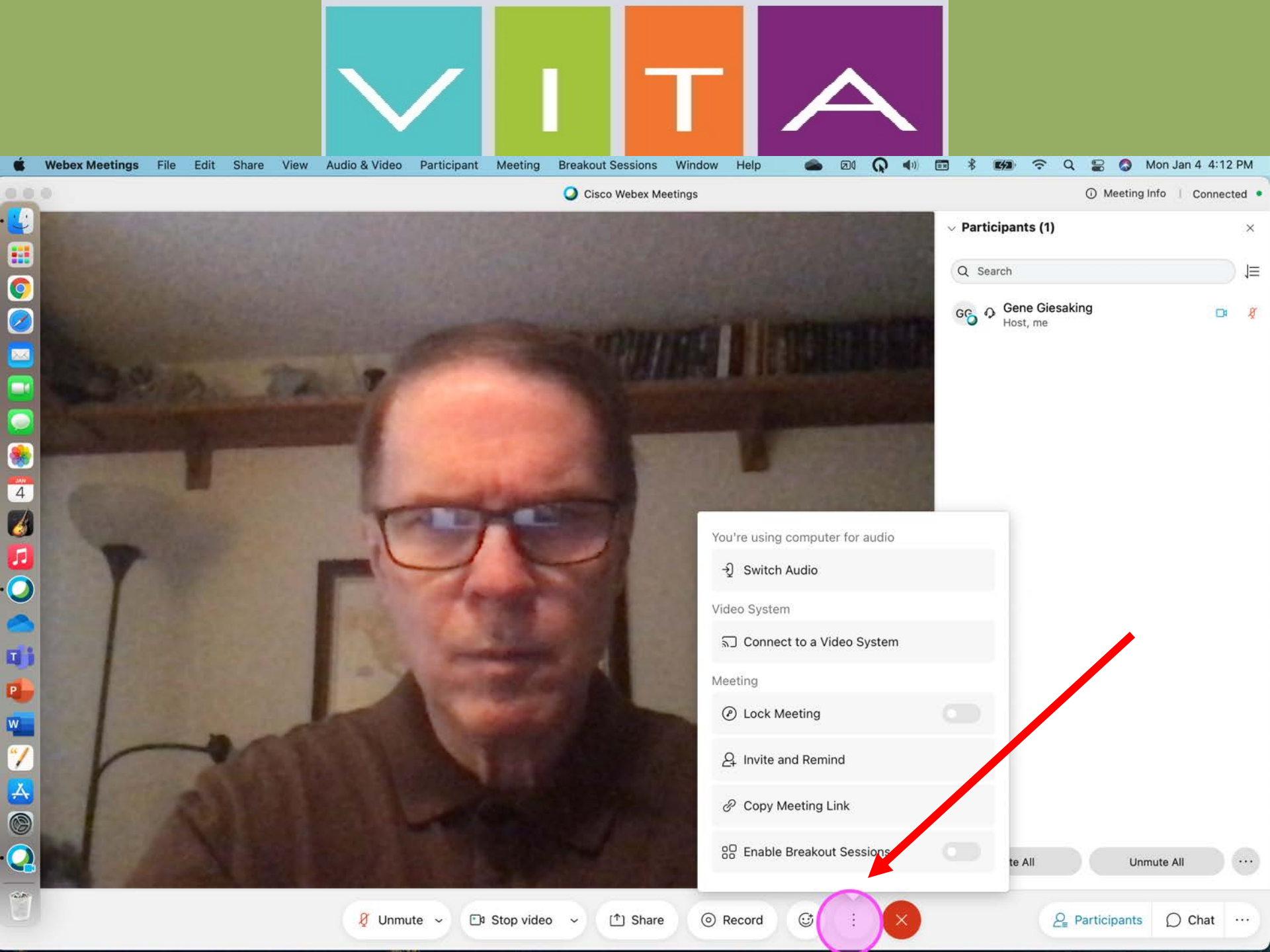
Participants (1)

Search

GG Gene Giesaking
Host, me

Mute All Unmute All

Unmute Stop video Share Record Participants Chat


VITA
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Meeting Info
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Participants (1)
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Switch Audio
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Connect to a Video System
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Lock Meeting
Invite and Remind
Copy Meeting Link
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Unmute All
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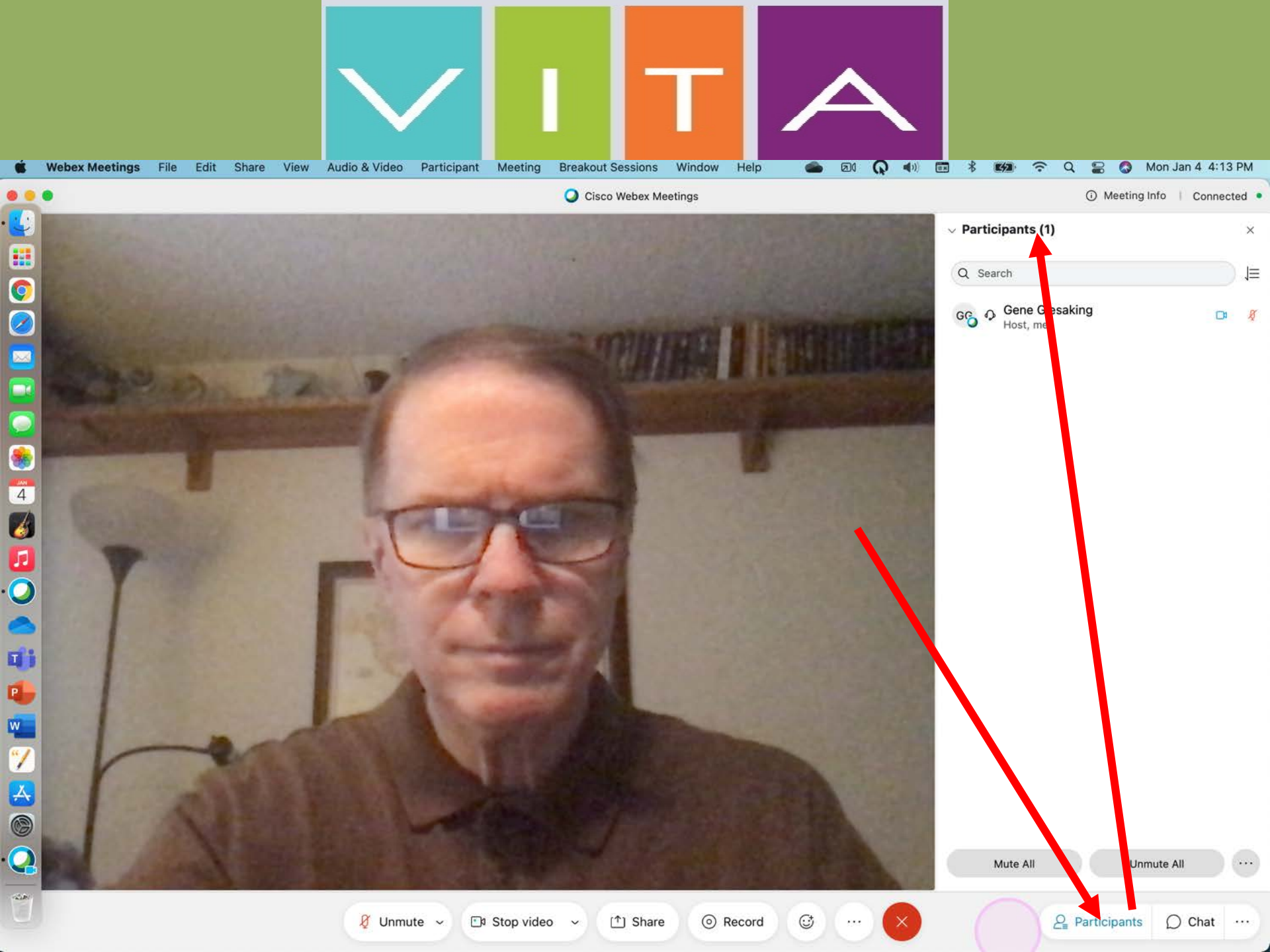
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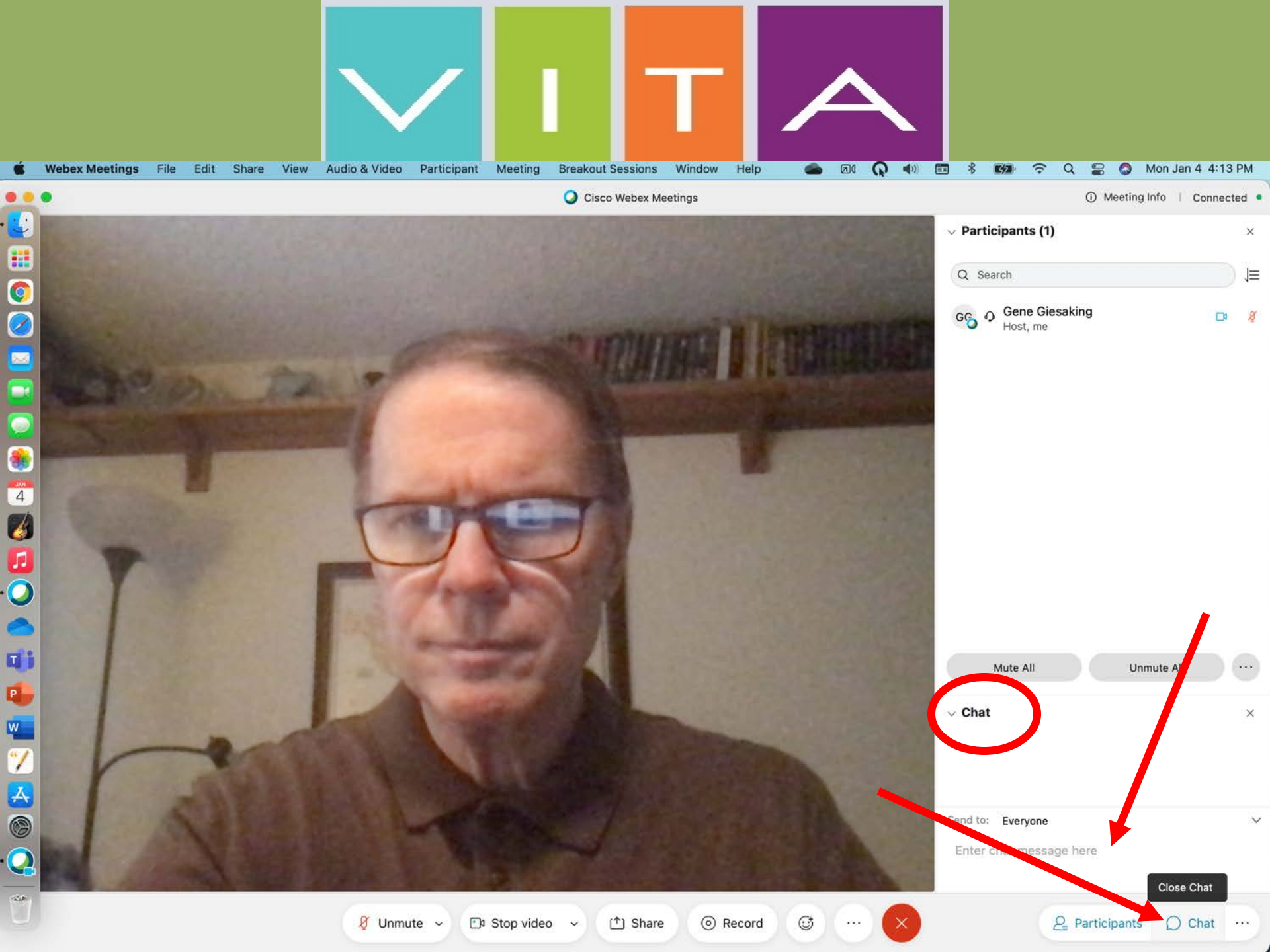
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Unmute All
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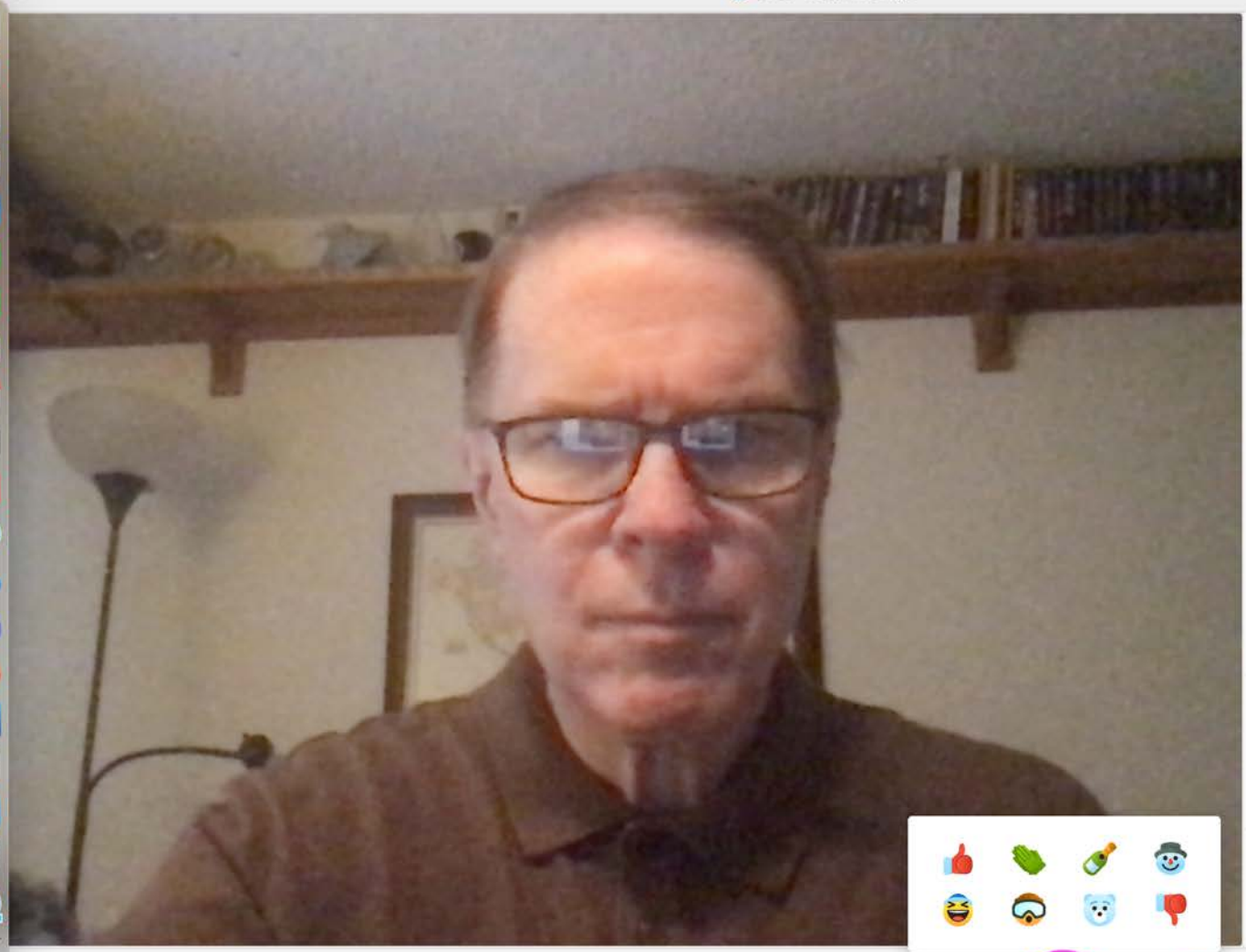
Send to: Everyone
Enter chat message here
Close Chat
Unmute
Stop video
Share
Record
Participants
Chat

VITA

Webex Meetings File Edit Share View Audio & Video Participant Meeting Breakout Sessions Window Help Mon Jan 4 4:13 PM

Cisco Webex Meetings

Meeting Info | Connected



Participants (1)

Search

GG Gene Giesaking
Host, me

Mute All Unmute All

Chat

Send to: Everyone

Enter chat message here

Unmute Stop video Share Record Participants

Course Outline -- January 2022

1. Introductions, VSOC, Log-ins, VSOC Test, Intro to TaxSlayer, 1st return
2. Intake, Intake-Test, Filing Status, Dependents,
   Income –Salaries & Wages, Income-Business
3. Income-Retirement, Income-Capital, Adjustment 2 Income
4. Standard & Itemized deductions, Credits
5. ACA, Miscellaneous Forms, Other taxes, AZ stuff
6. Customer Service, FSA, Pub.6744 Review, Feedback

Every session will begin with Homework Review

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AGENDA

1. Housekeeping & Introductions
2. Volunteer Standards of Conduct (VSOC)
3. Link & Learn Log-in
4. VSOC Certification Test
5. Taxpayer Practice Lab Log-in
6. Intro to TaxSlayer software
7. Demo “Doing a Tax Return”
8. Homework Assignment

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- Volunteer Introductions
  - Name?
  - What do you do for fun?
  - Why did you decide to volunteer?

THANK YOU FOR BEING HERE,
WE COULDN'T DO IT WITHOUT YOU!

fppt.com

Volunteer Standards of Conduct

All volunteers, including volunteers who do not prepare returns.
Estimated Completion Time: 1 hour
Minimum Proficiency Required: 8 out of 10 Correct

Intake/Interview and Quality Review

All tax law certified volunteers, site coordinators, quality reviewers, and instructors.
Estimated Completion Time: 20 minutes
Min. Proficiency Required: 8 out of 10 Correct

Federal Tax Law Update Test for Circular 230 Professionals

Limited to volunteers who are authorized under Circular 230 to practice before the IRS. These volunteers have a professional designation of attorney, Certified Public Accountant, and/or Enrolled Agent. Volunteers who complete this certification level can prepare any tax returns that fall within the scope of service of the VITA/TCE Programs.
Est. Completion Time: 1 hour
Minimum Proficiency Required: 12 out of 15 correct

Foreign Student

Est. Completion Time: 2 hours
Min. Proficiency Required:
40 out of 50 Correct

Site Coordinator

Est Completion Time: 1 hour
Min, Proficiency Required:
12 out of 15 Correct

Basic

Recommended for, but not limited to, volunteers with 0-1 years of experience.
Est. Completion Time: 4 hours
Min. Proficiency Required:
24 out of 30 Correct

Advanced

Recommended for, but not limited to, volunteers with two or more years of experience.
Est. Completion Time: 4 hours
Min. Proficiency Required:
28 out of 35 Correct

Qualified Experienced Volunteer

Est. Completion Time: 2 hours
Min. Proficiency Required:
16 out of 20 Correct

Optional Specialty Courses

Puerto Rico Level I

Requires Basic or Advanced Certification
Est. Completion Time: 2 hours
Min. Proficiency Required: 12 out of 15 Correct

Puerto Rico Level II

Requires Puerto Rico I Certification
Est. Completion Time: 2 hours
Min. Proficiency Required: 12 out of 15 Correct

Military

Requires Advanced Certification
Est. Completion Time: 1 hour
Min. Proficiency Required:
12 out of 15 Correct

International

Requires Advanced Certification
Est. Completion Time: 1 hour
Min. Proficiency Required:
12 out of 15 Correct

All volunteers must complete:

- Standards of Conduct Training & Test (Pub. 4961)
- Intake/Interview & Quality Review Training & Test (Pub. 5101)

Tests are taken on the website:
linklearncertification.com

fppt.com

All volunteers must:

- Pass appropriate testing before volunteering at any VITA site
- Complete Form 13615 Volunteer Agreement
  - Must be signed and dated
  - Name must match photo ID
  - Confirms tests passed and certification level
  - Must be signed by your site coordinator(s)

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Reference Tools & Resources

Publication 4012 (Step-by-step procedures for electronic return prep)

IRS.gov – Interactive Tax Assistance (ITA)

Publication 17

Site Coordinator

These PowerPoint Training Slides

Volunteer Hotline: **1-800-829-8482 (1-800-TAX-VITA)** is for volunteers only

These can be referred to with each tax return prepared.

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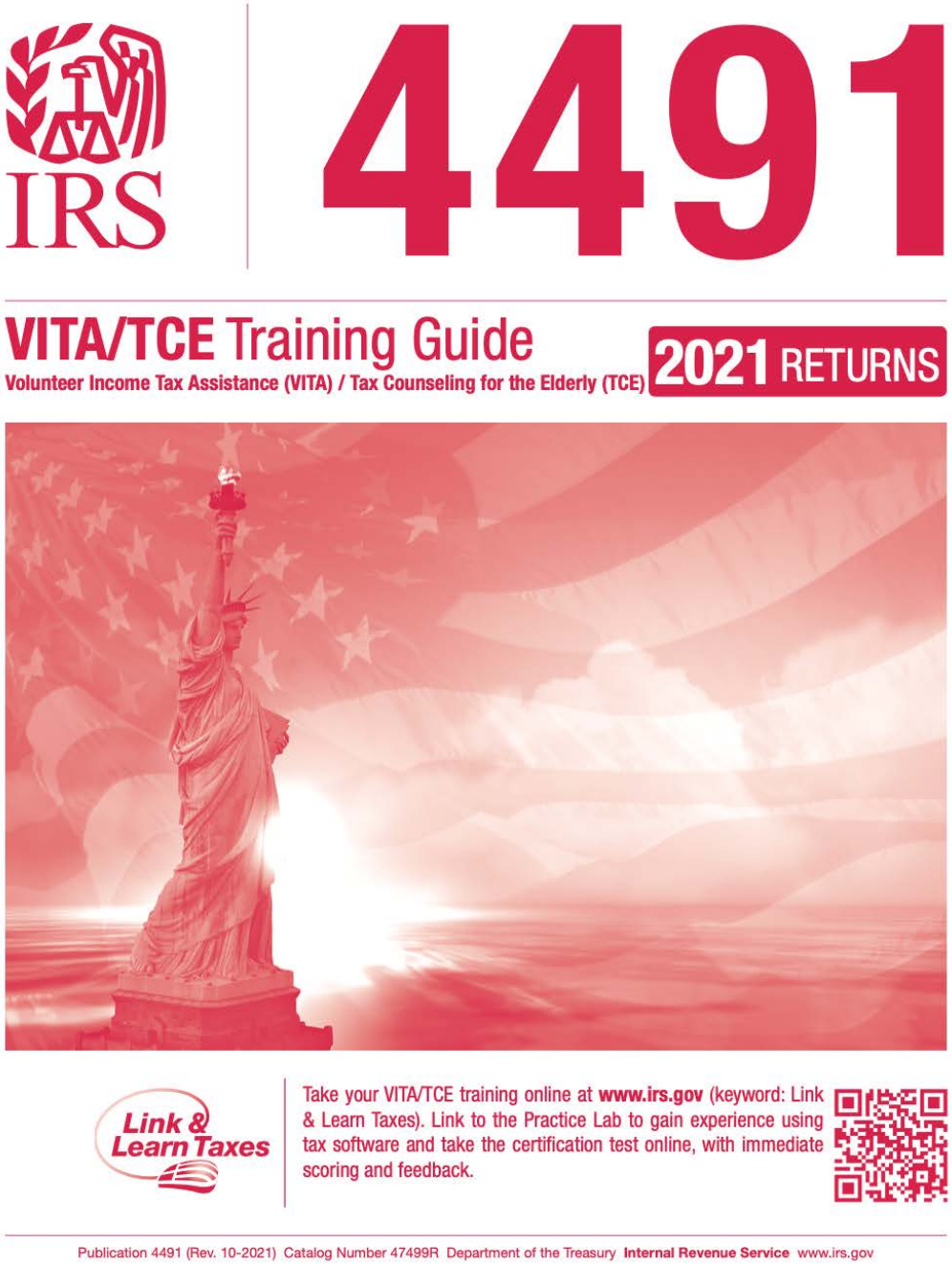

Download Publication 4491 if you want the training materials in print format from the website: "irs.gov"
or
access the tax lessons online through the website: "linklearncertification.com".

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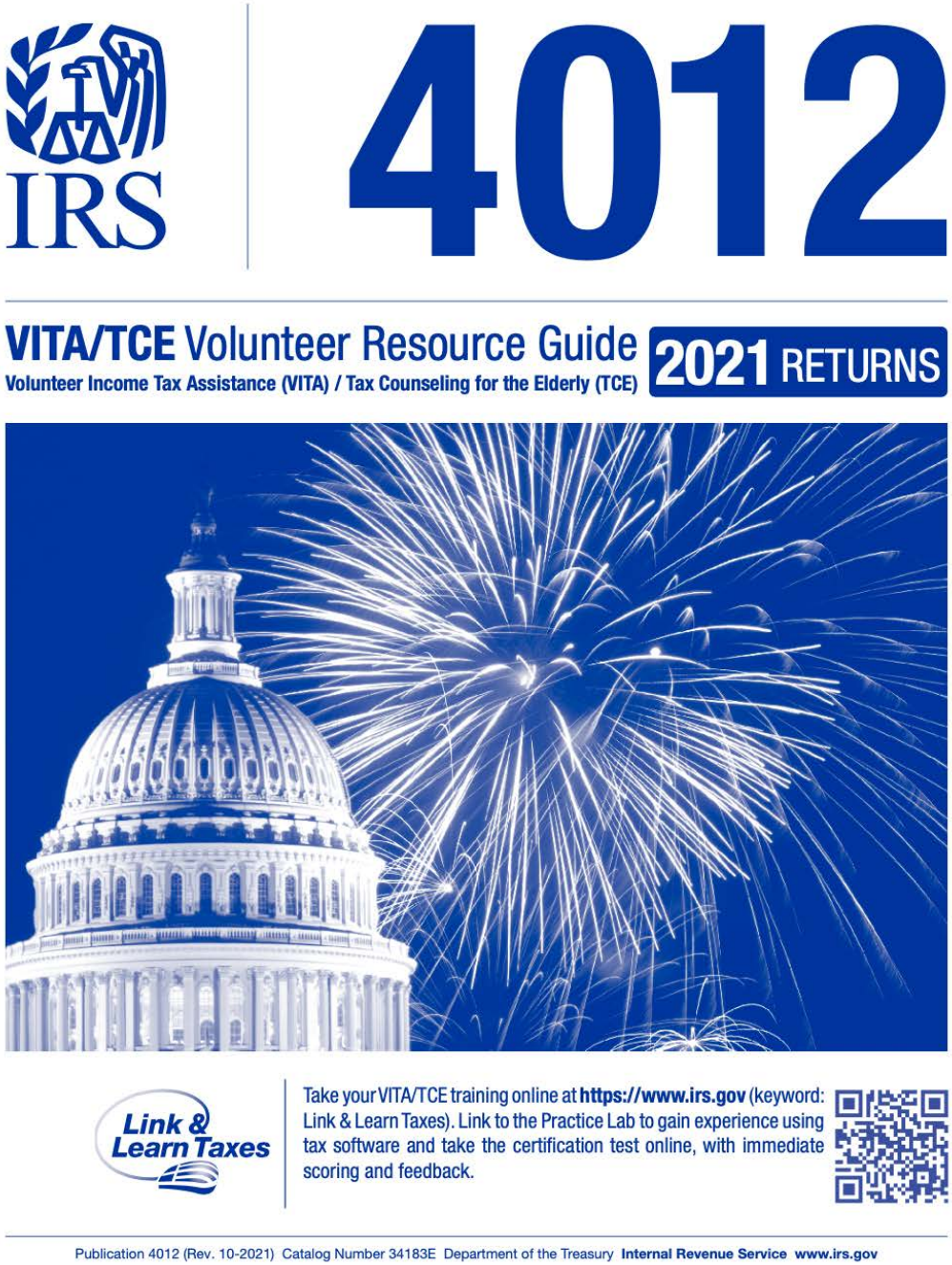
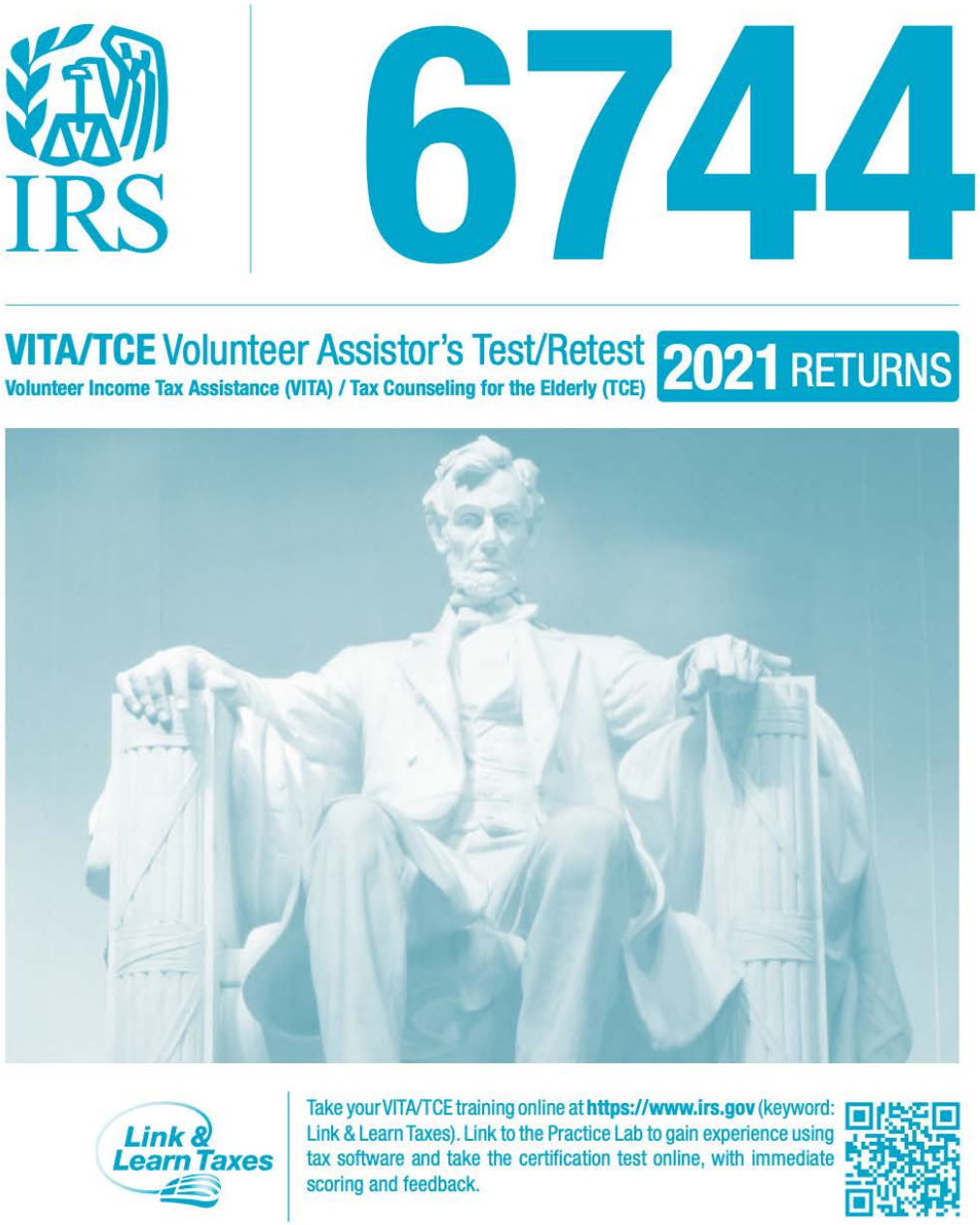


Download Publication 4012 from the website: “irs.gov”.

fppt.com



IRS

6744

VITA/TCE Volunteer Assistor's Test/Retest **2021 RETURNS**

Volunteer Income Tax Assistance (VITA) / Tax Counseling for the Elderly (TCE)

Link & Learn Taxes

Take your VITA/TCE training online at **https://www.irs.gov** (keyword: Link & Learn Taxes). Link to the Practice Lab to gain experience using tax software and take the certification test online, with immediate scoring and feedback.

Form 6744 (Rev. 10-2021) Catalog Number 43560V Department of the Treasury **Internal Revenue Service** www.irs.gov

Download Publication 6744 from the website: "irs.gov".

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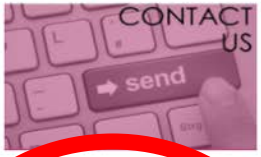
Volunteer with us!

Get Free Tax-Prep Help!

Need More Help?

Contact us!



VITA Volunteer Resources

VITA
VOLUNTEER INCOME TAX ASSISTANCE

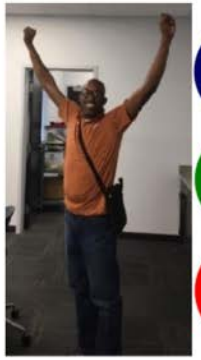
VOLUNTEERS NEEDED!

VITA
VOLUNTEER INCOME TAX ASSISTANCE

VITA prepares tax returns for FREE for low-to-moderate income individuals and families!

Since 2003, the City of Phoenix Human Services Department has implemented an Earned Income Tax Credit (EITC) Campaign.

Every year millions of dollars in tax refunds go unclaimed because people are unaware of the various credits available to them such as the EITC, a refundable federal income tax credit for low-income working individuals and families.



Provided free tax assistance to more than 5,799 low and limited income households

Helped families claim more than $6.2 million in federal tax refunds (over $2.3 million from Earned Income Tax Credit)

266 volunteers received free training and gave back 10,880 hours to the community

phoenix.gov/eitc

fppt.com

Overview of VITA Procedures

Clients proceed through these steps:

- Greeting/Signing-In
- Screening/Intake & Review (Form 13614-C)
- Tax return preparation
- Quality Review

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Overview of VITA Drop-Off Site Operation

Client calls to schedule an appointment for over-the-phone screening

A volunteer screens client for appointment eligibility and schedules

Client comes to the site for the scheduled appointment

Tax law certified volunteer screens client to verify all documents

Client drops off the documents and schedules pick-up appointment before leaving the site

Tax Preparer prepares tax return at the VITA site

Experienced Tax Preparer quality reviews the tax return

Client returns for the scheduled appointment to pick up documents and the tax return

COVID Protocols will be followed at all sites by Taxpayers and Volunteers

Volunteer Standard of Conduct Agreement (VSoC) - Form 13615

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Volunteer Standard of Conduct Training

(Pub. 4961)

- **All volunteers** at tax sites (tax preparers, site managers, intake volunteers, etc.) must complete this training
- Unethical is defined as "not conforming to agreed standards of moral conduct, especially within a particular profession. In most cases, unethical behavior is acted upon with the intent to disregard the established laws, procedures, or set policies"

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Volunteer Standard of Conduct Training

- Do not confuse **an unethical action** with a lack of knowledge or **a simple mistake**.

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Volunteer Standard of Conduct Training

Example: If volunteer, Mary, prepares a return which includes a credit the taxpayer does not qualify for because Mary doesn't understand the law, she did not act unethically. However, if Mary knowingly allowed a credit for which the taxpayer did not qualify, she committed an unethical act and violated the Volunteer Standards of Conduct (VSoC).

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Volunteer Standard of Conduct Training

If Mary knowingly does not list cash income on a tax return and Ed, the quality reviewer, just misses the omission; who has acted unethically?

- Mary has knowingly prepared a false return and is in violation of the standards.
- Ed, if he does not notice the omission, did not knowingly prepare a false return and did not violate a standard.

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Volunteer Standard of Conduct Training

#1 - I will follow the Quality Site Requirements(QSR)

QSR #1 - Certification; complete your training courses and testing prior to working at your site. We will need to confirm your identity when you report to your site the first time.

QSR #2 - Intake/Interview Process; use the intake and quality review sheet.

QSR #3 - Quality review; All returns must be quality reviewed and all sections completed on the intake form.

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Volunteer Standard of Conduct Training

#1 - I will follow the Quality Site Requirements(QSR)

QSR #4 - Reference Materials; all sites will have Pub 4012's and Pub 17's.

QSR #5 - Volunteer Agreement: you must complete the volunteer agreement

QSR #6 - Timely Filing;

QSR #7 - Title VI; will be displayed at the tax site.

QSR #8 - Site ID Number; use the correct one

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Volunteer Standard of Conduct Training

#1 - I will follow the Quality Site Requirements(QSR)

QSR #9 - E-file Number; use the correct one

QSR #10 - Security, Privacy, and Confidentiality is of greatest importance.

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Volunteer Standard of Conduct Training

#2 - I will not accept payment or solicit donations for preparing taxes.

We **DO NOT** accept donations or ask for donations at our sites!

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Volunteer Standard of Conduct Training

#3 – I will not solicit business from the taxpayers I assist or use the knowledge I gained about them (their info) for any direct or indirect personal benefit for me or any other specific individual.

- If you are an accountant, you cannot solicit business from the taxpayer.
- You cannot ask clients out.

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Volunteer Standard of Conduct Training

#4 – I will not knowingly prepare false returns.

Example: not counting cash income, listing false dependents, not conducting complete interviews, etc.

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Volunteer Standard of Conduct Training

#5 – I will not engage in criminal, infamous, dishonest, notoriously disgraceful conduct, or any other conduct deemed to have a negative effect on the VITA programs.

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Volunteer Standard of Conduct Training

#6 – I will treat all taxpayers in a professional, courteous and respectful manner.

If a client is upset with you because there has been a change in their tax return from last year, they owe money, or they do not agree with how you are preparing their return, politely ask them to wait and speak with the site coordinator.

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Volunteer Standard of Conduct Training

Consequences of not adhering to this include:

- Being barred from volunteering with VITA
- May be added to the registry of barred volunteers.
- Taxpayer is liable for any tax deficiency and may seek money from the preparer and SPEC partner.
- Our Partner(s) can lose funding, use of EFINS, and removal from the VITA program.

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Volunteer Standard of Conduct Training

What if the taxpayer is not telling the truth?

- If you ever sense that a taxpayer is not telling the truth, do not ignore it.
- Conduct a thorough interview and get as much information as possible.
- Get your site coordinator.
- If you are not comfortable with the information provided from the taxpayer, you are not obligated to prepare the return.

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Volunteer Standard of Conduct Training

The taxpayer is ultimately responsible for the information on the return

- Let the Taxpayer know that when they sign the return they guarantee under penalty of perjury that they have examined the return and its accompanying forms for accuracy.

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Volunteer Standard of Conduct Training

- Treat all taxpayers professionally, with courtesy and respect
- Safeguard the confidentiality of taxpayer information
- Apply the tax laws equitably and honestly to the best of your ability
- Prepare only returns within the scope of your training and this program

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Volunteer Standard of Conduct Training

- Exercise reasonable care in the use and protection of equipment and supplies
- Do not accept payment from the taxpayer for services provided.
- Do not download any programs onto the computers.

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Volunteer Standard of Conduct Training

- Let’s review the material in our Publication 6744
- Pages 13-19

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Volunteer Standard of Conduct Training

Any Questions?

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Link & Learn Certifications Site

fppt.com

Link & Learn Certification

Log-In ID & Password **https://www.linklearncertification.com/d/**

2017-18 West Valley VITA Log-In ID's and Password's

For Link & Learn Certification Website:

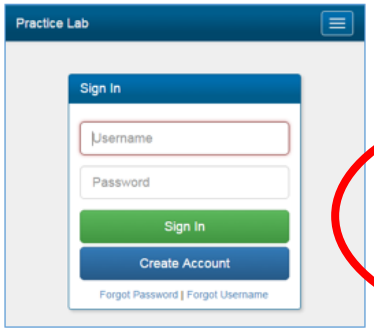
Log-In Name: _____

Password: _____

For Practice Lab (Main Screen)

(in all caps, no space)

Password: **TRAINPROWEB**



For TaxSlayer (Practice Lab):

User Name: _____

Password: _____

Please, use this sheet to write your Log-In & Password

Please, use this sheet to write your Log-In & Password

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Link & Learn Certification

Log-In ID & Password https://www.linklearncertification.com/d/

VITA/TCE Central

IRS

Home

Certification Tests

Login Name:

Login Name

Password:

Password

Login to your IRS account:

Login

Set up a new IRS account

Create Account

Forgot Password?

CLICK HERE

Instructor Tools

Classroom Presentations

Lesson Plans

ctor Guide 4555e

Quick Links

Link & Learn Taxes Lessons

Certification Test/Retest PDFs

VITA/TCE Training Guide PDFs

Evaluations

Practice Lab

VSOC Training

Intake/Interview and Quality Review Training

Click here to create a new account

Click here For practice tax returns

All volunteers who currently have an account, after y gin, please go to 'My Account' and update new or changed data. Be sure to click the 'Save' button at the bottom of the page.

New volunteers must click "Create Account" in order to take the certification test. Click *Getting Started Tutorial* under More Help for instructions on creating an account and taking the certification tests. If you already have an account, please log in above.

Site Coordinators must create an account and register as Site Coordinator in the Site Coordinator field in order to take the Site Coordinator training. Foreign Student and Scholar volunteers no longer need to create an account and register as Foreign Student in the Group field in order to take the Foreign Student and Scholar test.

Important: You must turn off pop-up blockers to view the training.

If you have not completed an evaluation for the VITA/TCE training program click Evaluation under Quick Links.

RSS Feed | YouTube | Facebook | iTunes | Twitter

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Link & Learn Certification

Log-In ID & Password https://www.linklearncertification.com/d/

VITA/TCE Central

IRS

Home

Self-Registration

Complete the fields below to create your account in the system. Required fields are marked by an asterisk (*), all other are optional.

* Group: 01 - VITA Volunteer

* Do you want to take the Site Coordinator course? ○ Yes ◉ No

* Training Source: Link and Learn Taxes (e-learning)

* First Name:

* Last Name:

SEID: (For IRS Employees Only)

* Login:

* Password:

* Confirm password: Password Complexity Requirements

* Email Address:

* Confirm Email Address:

PLEASE NOTE: Should you ever forget your password, a valid email address is required to have a new one sent to you.

Click "Yes" if you are a Site Coordinator

Please use your full and legal name.

Leave this blank

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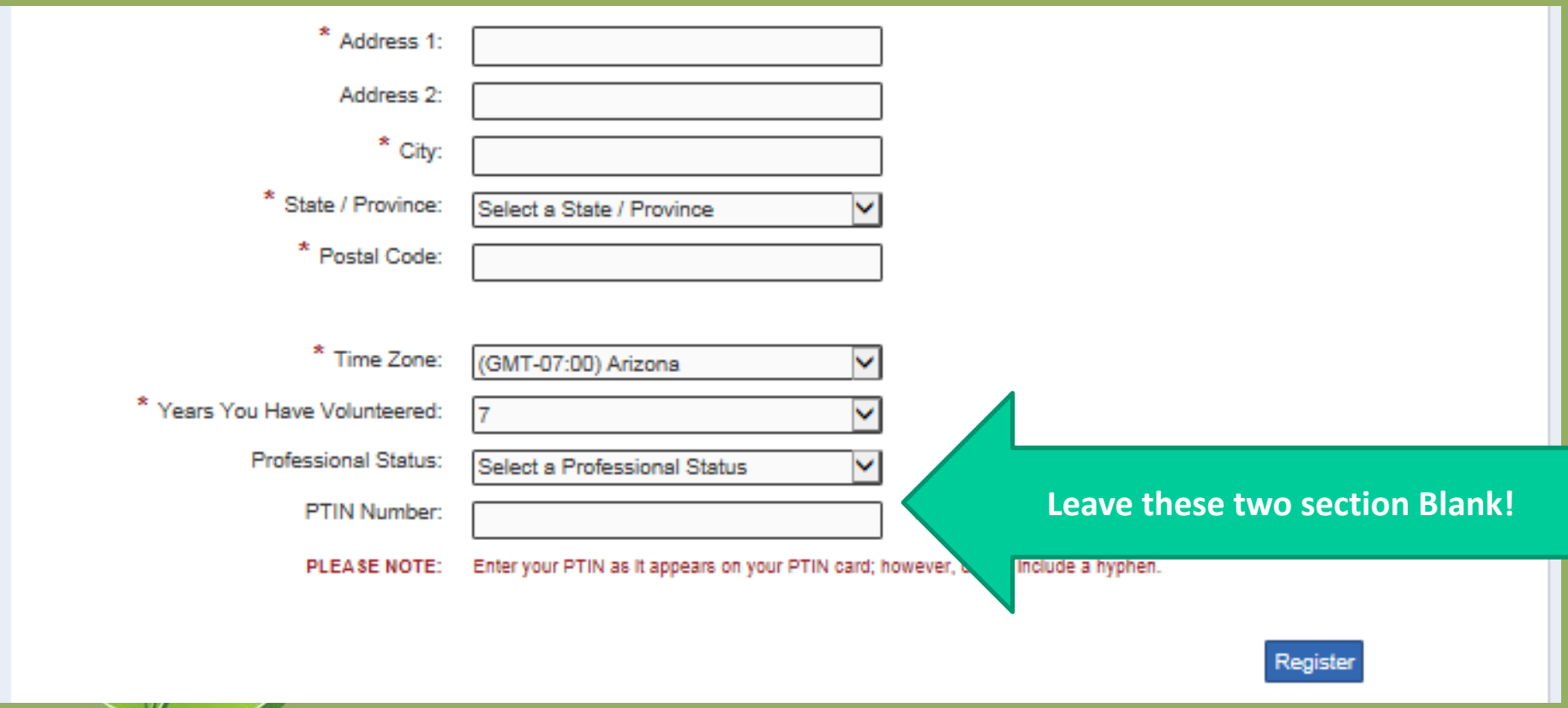
Link & Learn Certification

Log-In ID & Password **https://www.linklearncertification.com/d/**



Leave these two section Blank!

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Link & Learn Certification

Log-In ID & Password https://www.linklearncertification.com/d/

Welcome Ann! | Logoff

VITA/TCE Central

IRS

2016 VITA/TCE Certification Test | My Account

Basic | Advanced | Military | International | Puerto Rico | Foreign Student

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)
2016 Volunteer Standards of Conduct - Exam			0
2016 Intake/Interview and Quality Review Exam			0
2016 Site Coordinator Training			
2016 Advanced Exam			0
2016 Health Savings Accounts (HSA) Exam			0

If you would like to review the Volunteer Standards of Conduct course, click here to review the course in PDF format.

Click here to review the Intake/Interview & Quality

To take the tests, click on exams

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Link & Learn Certification

Log-In ID & Password https://www.linklearncertification.com/d/

Welcome Ann! | Logoff

VITA/TCE

2016 VITA/TCE Certification Test | My Account

Basic | Advanced | Foreign Student

2016 Volunteer Standards of Conduct - Exam Launch

Course Number: VSOC Exam

Course Information
All volunteers must pass the Volunteer Standards of Conduct (VSOC) - Exam with a score of 80% or greater in order to access Basic or Advanced exams.

Click Launch on the upper right of this window to start the VSOC test.

To start the e
click here

Course name			
2016 Volunteer Standards of Conduct - Exam			0
2016 Intake/Interview and Quality Review Exam			0
2016 Site Coordinator Training			N/A
2016 Advanced Exam			0
2016 Health Savings Accounts (HSA) Exam			0

uld like to review the
r Standards of
course, click here to
review the course in PDF
format.

Click here to review the
Intake/Interview & Quality
Review training.

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Link & Learn Certification

Log-In ID & Password **https://www.linklearncertification.com/d/**

2016 Volunteer Standards of Conduct - Exam

Exit Course

2016 Volunteer Standards of Conduct Exam

Use your training and reference tools to answer the questions. You must answer eight of the following ten questions correctly to pass the Volunteer Standards of Conduct test.

Click the 'Start Assessment' button to begin the Volunteer Standards of Conduct (VSOC) exam.

Start Assessment

To start the exam, click here

fppt.com

Link & Learn Certification

Log-In ID & Password **https://www.linklearncertification.com/d/**

2016 Volunteer Standards of Conduct - Exam

Exit Course

2016 Volunteer Standards of Conduct Exam - Question 1 of 10.

1. Prior to working at a VITA/TCE site, **ALL** VITA/TCE volunteers (greeters, client facilitators, tax preparers, quality reviewers, etc.) must:

- A. Annually pass the Volunteer Standards of Conduct (VSC) certification test with a score of 80% or higher.
- B. Sign and date the Form 13615, Volunteer Standards of Conduct Agreement, agreeing to comply with the VSC by upholding the highest ethical standards.
- C. Pass the Advanced tax law certification.
- D. All of the above.
- E. A and B

1st, choose the answer

Next | Skip | First Skipped Question | Next Skipped Question | 1 | Help

Than 2nd, click "Next" to continue

fppt.com

Link & Learn Certification

Log-In ID & Password https://www.linklearncertification.com/d/

2016 Volunteer Standards of Conduct - Exam

Exit Course

the quality service they received, what would be the appropriate action to take?	you cannot accept any payment for your services.
4. Maggie wants her tax refund quickly; however, she doesn't have a bank account for direct deposit. She asks Josh, the tax law-certified preparer, to deposit her refund into his checking account and turn the funds over to her when received. If Josh agrees to do this, has he violated any of the Volunteer Standards of Conduct?	Yes
5. Pat is a paid tax preparer in the community; he also gives back to the community by serving as an IRS tax law-certified volunteer tax preparer at a VITA/TCE site. While conducting the interview with the taxpayer, Pat discovers the taxpayer's small business will generate a loss, making the return out of scope for the VITA/TCE Programs. Pat explains to the taxpayer that the tax return cannot be prepared at the VITA/TCE site, but he will offer the taxpayer a discount at his paid tax preparation business down the road. Has Pat violated the Volunteer Standards of Conduct (VSC)?	A. Yes, it is a violation of the VSC for Pat to solicit business from any taxpayer at the VITA/TCE site.
6. Ann, an IRS tax law-certified tax preparer, told the taxpayer that cash income does not need to be reported because the IRS will never know about it. Ann prepared the return without the cash income. The designated quality reviewer simply missed this omission and the return was printed, signed, and e-filed. Did the designated quality reviewer violate the Volunteer Standards of Conduct?	No
7. Jan, a greeter, overheard an IRS tax law-certified volunteer, Jim, trying to sell insurance to a taxpayer he was helping. Jim is an insurance agent in the community. Jan feels like Jim was pushy, made th[illegible] andard of C[illegible]	B. Tell the site coordinator what she heard, so he can immediately remove Jim from the site and report the incident using the external referral process by sending an email to WI.Voltax@irs.gov.
8. [illegible] ocess is im[illegible] ed to:	D. All of the above.
9. [illegible] ake process, which of the following should the [illegible] the taxpayer and spouse, if applicable, have with [illegible] taxpayers can be served that day?	D. All of the above
10 [illegible] uality service and accurate return preparation, every site [illegible] ed to have a process for assigning taxpayers to IRS tax law-cer[illegible] ed preparers who are certified at or above the level required to prepare their tax return.	True

Back | SUBMIT | First Skipped Question | Next Skipped Question | Review | Help

1st, review the answers

2nd, click "Submit" button to continue

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Link & Learn Certification

Log-In ID & Password https://www.linklearncertification.com/d/

2016 Intake/Interview and Quality Review Exam

Exit Course

2016 Intake/Interview and Quality Review Exam

Congratulations. You have completed the Intake/Interview and Quality Review Exam with a passing score.

Your Results:

Questions	
1. When should an IRS-certified volunteer preparer participating in the VITA/TCE Programs perform a comple ew of a taxpayer?	Correct
2. The certified volunteer preparer should verify the return is within their certification level as part of the Intake/Interview process.	Correct
3. When reviewing Form 13614-C, you see the "Interest" question is marked "Yes" and the taxpayer gives you a Form 1099-INT. You should ask the taxpayer if they had any other interest income.	Correct
4. VITA and TCE sites are required to conduct quality reviews:	Correct
5. A taxpayer tells you that t of the coverage. This information along with all ot able. As a tax preparer, you should:	Correct
6. What information must a	Correct
7. The taxpayer signs the ta ccuracy of the information on the return.	Correct
8. You can quality rev d instead of waiting for someone else to quality review the return.	Correct
9. Which of the following fou s for quality review is not correct:	Correct
10. Completing a thorough intervie ore entering taxpayer information into the software helps avoid which of the following potential problems?	Correct

Assessment Statistics

Your Score:	100 %
Minimal Passing Score:	80 %
Total Questions:	10
Correct Answers:	10 (100%)

Click here to close exam screen

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Link & Learn Certification

Log-In ID & Password https://www.linklearncertification.com/d/

Any Questions?

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Link & Learn Certification

While we are here at this website, why don't we all take the test over the "Volunteer Standards of Conduct"?

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TaxSlayer (Practice Lab)

fppt.com

TaxSlayer – Practice Lab (Log-In ID & Password)

https://vita.taxslayerpro.com/IRSTraining/en/Account/Access

You can use the website above to access the Practice Lab.

Or

Use the LinkLearnCertification website and click on the link for the Practice Lab.

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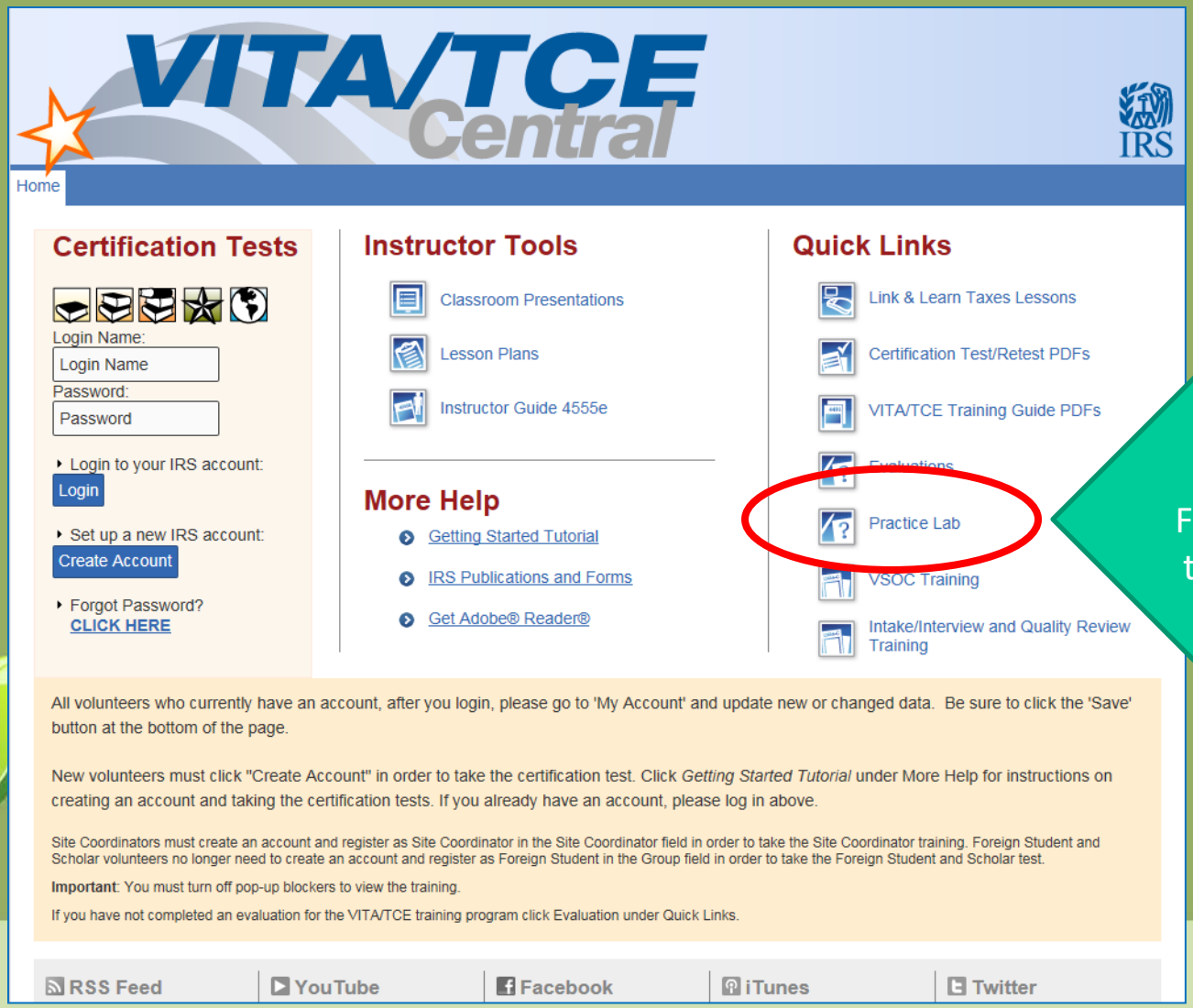
Link & Learn Certification

Log-In ID & Password https://www.linklearncertification.com/d/



Click here For practice tax returns

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TaxSlayer – Practice Lab (Log-In ID & Password)

https://vita.taxslayerpro.com/IRSTraining/en/Account/Access

1. To be able to use the practice lab, you must create a Log-In and password for the link above. (Your Link & Learn user name and password **will not** work on the TaxSlayer – Practice Lab)

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TaxSlayer – Practice Lab
(Log-In ID & Password)

https://vita.taxslayerpro.com/IRSTraining/en/Account/Access

2. Go to the TaxSlayer – Practice Lab homepage (Copy and paste into a browser, and add to Favorites for easy access at a later time.) For the password, type in "**TRAINPROWEB**" in all CAPS.

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TaxSlayer – Practice Lab
(Log-In ID & Password)

https://vita.taxslayerpro.com/IRSTraining/en/Account/Access

3. Click the Create Account button to set up a new IRS account. Complete the fields to create your account in the system. Required fields are marked by an asterisk (*), all others are optional.

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TaxSlayer – Practice Lab (Log-In ID & Password)

https://vita.taxslayerpro.com/IRSTraining/en/Account/Access

1st

Practice Lab

Access Link & Learn Taxes

Hello,

Welcome to the Electronic Tax Software Practice Lab for VITA/TCE volunteers. When you enter this site, you will be able to prepare tax returns to practice what you just learned in Link & Learn Taxes. We recommend that you use the problems and exercises contained in Publication 4491 W, VITA/TCE Workbook, Comprehensive Problems and Practice Exercises. These problems and exercises were specifically designed to cover the types of tax returns that VITA/TCE volunteers encounter at their volunteer sites.

To access the practice lab enter below the password you received from the IRS or your site coordinator. If you do not know the password please contact your site coordinator or local IRS Relationship Manager.

If you are not currently a VITA/TCE volunteer and would like to become a volunteer, please click here to get started: https://www.irs.gov/Individuals/IRS-Tax-Volunteers. Your information will be forwarded to sponsoring partners in your area for further contact. You will be contacted within 2 weeks after you have submitted your information.

TRAINPROWEB

Login

2nd

Practice Lab

Sign In

Click here to create a new account

Passw

Sign In

Create Account

Forgot Password | Forgot Username

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TaxSlayer – Practice Lab (Log-In ID & Password)

https://vita.taxslayerpro.com/IRSTraining/en/Account/Access

Practice Lab

Change Language

Create New Account

3rd

Account Information

Email Address

Email Address

Confirm Email Address

Confirm Email Address

Required

Username

Username

Required

Password

Password

Confirm Password

Confirm Password

Required

Program Type

VITA

Site Identification Number (SIDN)

Site Identification Number (SIDN)

Skip this answer

Password Recovery

Security Question

Please Select a Question

Required

Security Answer

Security Answer

Required

Create Account

Cancel

fppt.com

TaxSlayer – Practice Lab (Log-In ID & Password)

https://vita.taxslayerpro.com/IRSTraining/en/Account/Access

Practice Lab

Hello, apicchione Options

4th

Practice Lab - Home

Welcome to the practice lab. The links below will help you get a better understanding of the software and best practices regarding tax processes. If you would like to begin using the software in the practice area, please press the link below.

Go to Practice Area »

Click here

Section 1: Getting Started with TaxSlayer Pro Online

- Pro Online: Login and Passwords

Section 2: Configuring TaxSlayer Pro Online

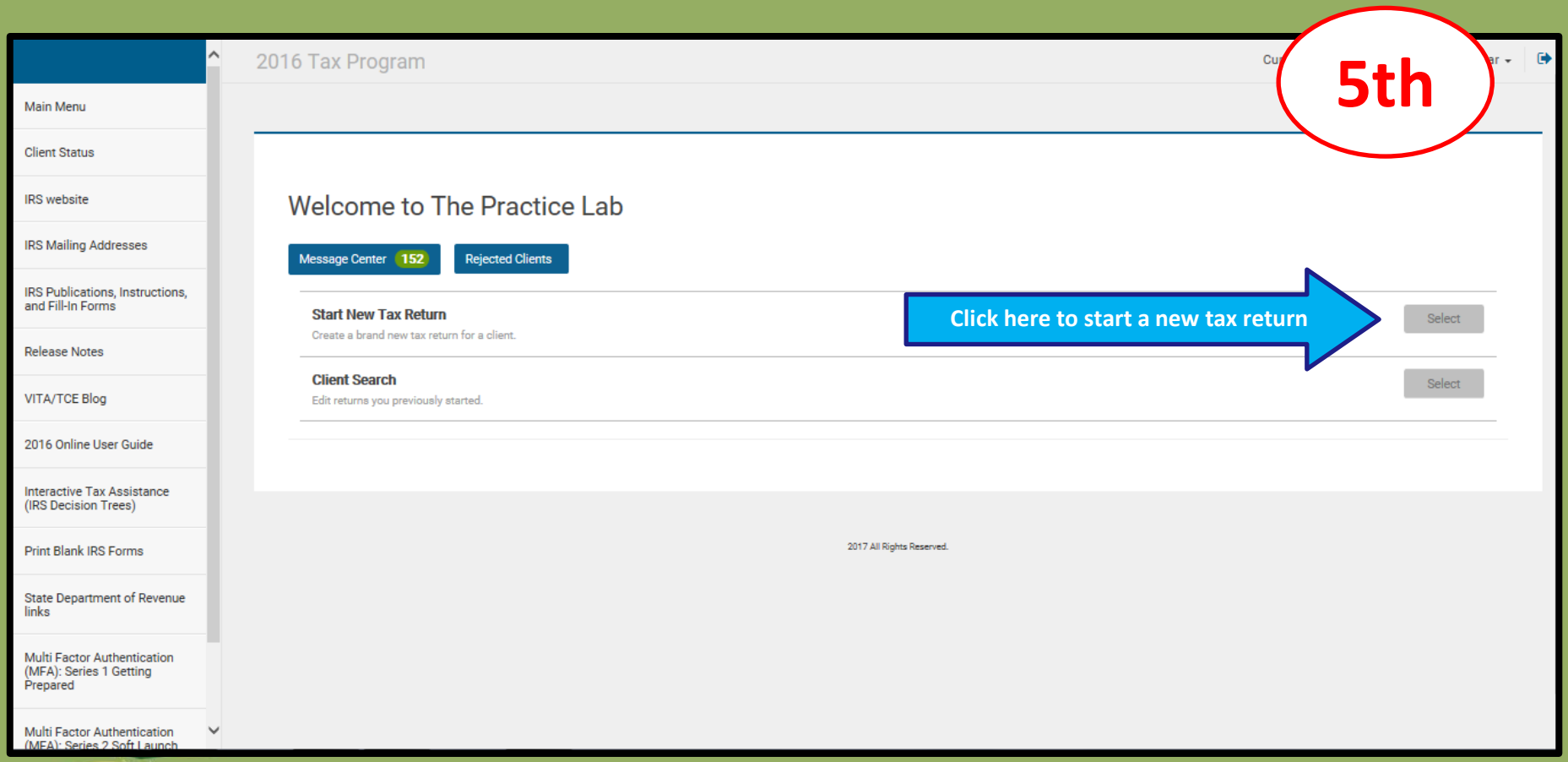
- Setting up Site Information
- Setting up Security Templates
- Adding Preparers
- Working with Custom Questions
- Configuring Printing
- Managing Returns
- Working with Reports
- Managing Multiple Sites

Section 3: Installing TaxSlayer Pro

- Contingency Procedures
- Installation and Network Configuration
- Setting up Site Information
- Setting up Security Templates
- Adding Preparers
- Working with Custom Questions
- Configuring Printing
- Managing Returns

TaxSlayer – Practice Lab (Log-In ID & Password)

https://vita.taxslayerpro.com/IRSTraining/en/Account/Access



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TaxSlayer – Practice Lab (Log-In ID & Password)

https://vita.taxslayerpro.com/IRSTraining/en/Account/Access

Any Questions?

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STARTING IN TAXSLAYER-1

Practice Lab - Home

Welcome to the practice lab. The links below will help you get a better understanding of the software and best practices regarding tax processes. If you would like to begin using the software in the practice area, please press the link below.

Go to Practice Area »

CLICK HERE TO START

Section 1: Getting Started with TaxSlayer Pro Online

- Pro Online: Login and Passwords

Section 2: Configuring TaxSlayer Pro Online

- Setting up Site Information
- Setting up Security Templates
- Adding Preparers
- Working with Custom Questions
- Configuring Printing
- Managing Returns
- Working with Reports
- Managing Multiple Sites
- Contingency Procedures
- 2017 TaxSlayer Enhancements

Section 3: Installing TaxSlayer Pro

- Contingency Procedures
- Installation and Network Configuration
- Setting up Site Information
- Setting up Security Templates
- Adding Preparers
- Working with Custom Questions
- Configuring Printing
- Managing Returns
- Updating and Transferring
- Working with Reports

CLICK HERE TO EXPLORE

Section 4: Preparing a Return

- Starting a Tax Return

Section 5: Electronic Filing

- Creating the e-file

Section 6: Enhancements and Miscellaneous

- Contingency Procedures

STARTING IN TAXSLAYER-1a

Section 4: Preparing a Return

- User Guides
- Starting a Tax Return
- Entering Basic Income Part 1
- Entering Basic Income Part 2
- Entering Adjusted Gross Income
- Entering Standard and Itemized Deductions
- Entering Basic Credits
- Entering Other Taxes
- Entering Refunds, Payments and Estimates
- Working with the Affordable Care Act
- Completing a State Return
- Advanced Tax Topics Part 1
- Advanced Tax Topics Part 2
- Printing a Return
- Searching for Existing Taxpayers
- Completing an Amended Return
- Completing 1040-NR

Section 5: Electronic Filing

- User Guides
- Creating the e-file
- Electronically Filing a State Return
- The Review Process
- Submitting e-files
- Working with Acknowledgements

Section 6: Enhancements and Miscellaneous

- User Guide
- TaxSlayer Scanned Documents
- TaxSlayer FSA
- TaxSlayer Enhancements
- Practice Return 1
- Practice Return 2
- Practice Return 3
- Practice Return 4
- Practice Return 5
- Practice Return 6
- Practice Return 7
- Practice Returns Puerto Rico
- Practice Return International
- Practice Return Military
- Recorded Webinar 1: Desktop & Contingency
- Recorded Webinar 2: Site Administration
- Recorded Webinar 3: Return Preparation 1
- Recorded Webinar 4: Return Preparation 2
- Recorded Webinar 5: Software Enhancements

Starting in Taxslayer-2

2021 Tax Program

Current User: IRS P | Change Tax Year | Logout

- Main Menu
- Client Status
- IRS website
- IRS Mailing Addresses
- IRS Publications, Instructions, and Fill-In Forms
- Release Notes
- VITA/TCE Publications and User Guides
- VITA/TCE Blog
- Suggestion Box: VITA/TCE

Welcome to The Practice Lab

Message Center 454 | Rejected Clients 0

Start New 2021 Tax Return
Create a brand new tax return for a client.

Click here to start a new return

Select

Client Search
Edit returns you previously started.

Select

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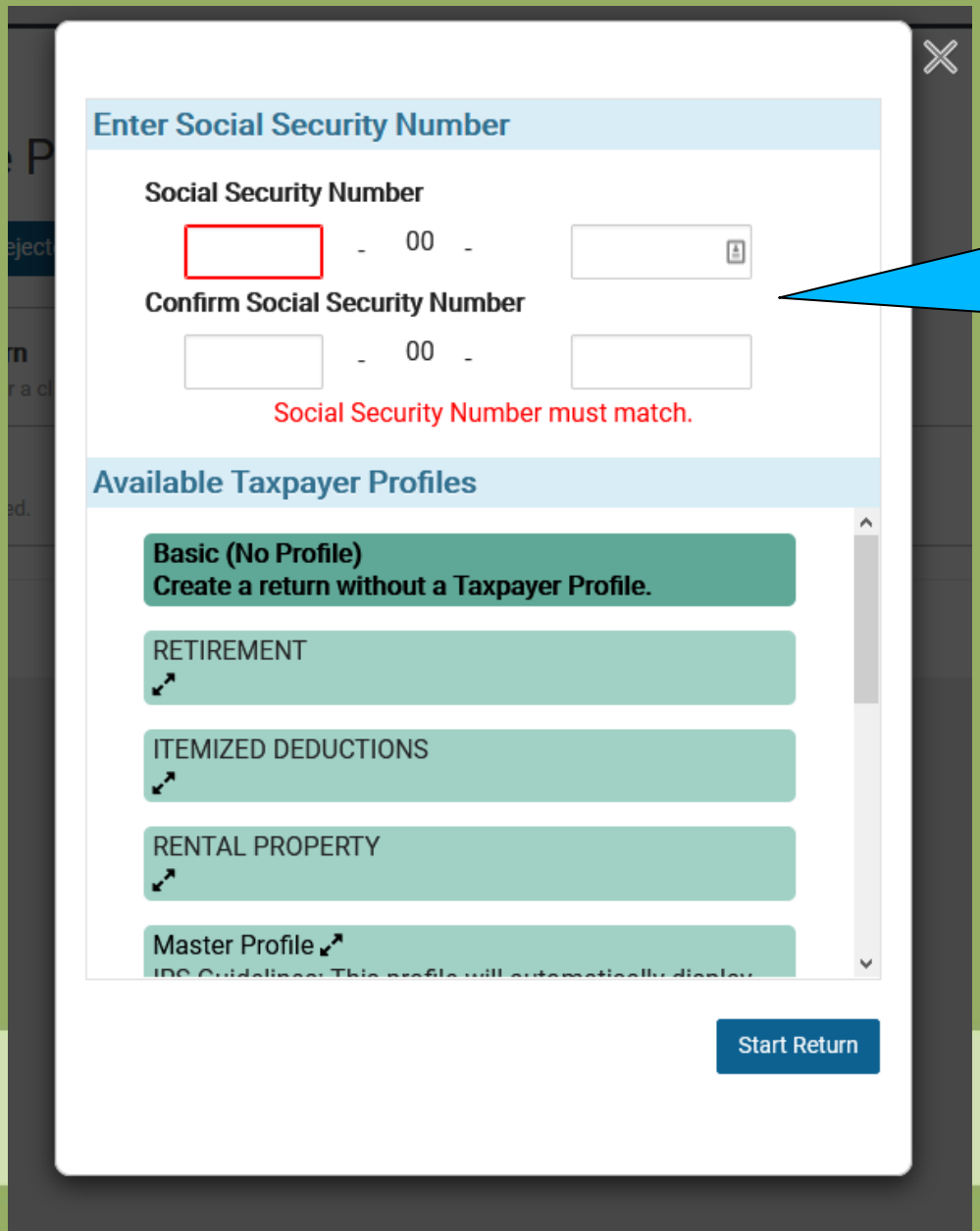
STARTING IN TAXSLAYER-3



ENTER SSN HERE.

CLICK HERE TO START RETURN

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STARTING IN TAXSLAYER-4

What's your filing status?

- Single
- Married Filing Joint
- Married Filing Separate
- Head of Household
- Qualifying Widow(er) with Dependent Children
- Nonresident Alien

Need help determining your filing status?

FILING STATUS WIZARD

BACK

CONTINUE

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STARTING IN TAXSLAYER-5

Practice Lab | 2018 | Help & Support | User

Collapse Menu

Enter the Form Number...

- Basic Information
  - Filing Status
  - Personal Information
  - Dependents/Qualifying Person
- Federal Section
- Health Insurance
- State Section
- Summary/Print
- E-file
- 2018 Amended Return
- Save & Exit Return
- Help & Support
- Save & Exit Return

Personal Information

FILING STATUS | CANCEL | CONTINUE

Taxpayer Information

Primary First Name *

MI

Last Name *

Suffix (Jr, Sr, etc.) ---

Social Security Number *The IRS requires your Social Security Number for e-filing.* *

123 - 00 - 1234

Date of Birth *

MM DD YYYY

Occupation

- [ ] the Taxpayer can be claimed as a dependent on someone else's return.
- [ ] Taxpayer was over age 18 and a full-time student at an eligible educational institution.
- [ ] Taxpayer is blind.

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STARTING IN TAXSLAYER-6

Practice Lab

2018

Help & Suppor

Collapse Menu

Enter the Form Number...

Basic Information

Filing Status

Personal Information

Dependents/Qualifying Person

Federal Section

Health Insurance

State Section

Summary/Print

E-file

2018 Amended Return

Save & Exit Return

Help & Support

Save & Exit Return

- [ ] the Taxpayer wishes to contribute $3 to the Presidential Election Campaign Fund.
- [ ] Taxpayer or Spouse served in a combat zone during the current tax year.
- [ ] Taxpayer was a nonresident alien for any part of the year.
- [ ] Taxpayer or Spouse was affected by a natural disaster during the current tax year.

Address and Phone Number

- [ ] I have a stateside military address.
- [ ] Check here if foreign address

Address (Number and Street) *

Apartment

ZIP Code *

City, Town, or Post Office *

State *

- Please Select -

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STARTING IN TAXSLAYER-7

Practice Lab

2018

Help & Support

Collapse Menu

Enter the Form Number...

Basic Information

Filing Status

Personal Information

Dependents/Qualifying Person

Federal Section

Health Insurance

State Section

Summary/Print

E-file

2018 Amended Return

Save & Exit Return

Help & Support

Save & Exit Return

Apartment

ZIP Code *

City, Town, or Post Office *

State *

- Please Select -

Resident State as of 12/31/2018 *

None

Daytime Telephone Number *

Secondary Telephone Number

CLICK HERE TO SAVE & MOVE ON TO NEXT SCREEN

FILING STATUS

CANCEL

CONTINUE

STARTING IN TAXSLAYER-8

2018 Tax Program

Current User: IRS P | Change Tax Year | Logout

Welcome to The Practice Lab

Message Center 28 | Rejected Clients 0

Start New 2018 Tax Return
Create a brand new tax return for a client.
Select

Client Search
Edit returns you previously started.
Select

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EVERYTHING STARTS on Basic

Information screen (Pub. 4012, B-5 ~ 7)

Practice Lab

Form Finder

Enter the form number...

- Basic Information
  - Filing Status
  - Personal Information
  - Dependents/Qualifying Person
  - IRS Identity Protection PIN
  - Recovery Rebate Credit
- Federal Section
- Health Insurance

2020 | Help & Support | Abigail Adams | Save & Exit

Basic Information

Filing Status	EDIT
Personal Information	EDIT
Dependents / Qualifying Person	BEGIN
IRS Identity Protection PIN	BEGIN

BACK

CONTINUE

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Entering Personal Information

Name, Address & SSN or ITIN

"CHECK YOUR DATA ENTRY"

MISMATCH

OF

NAME AND SOCIAL SECURITY NUMBER

WILL CAUSE DELAYS IN

PROCESSING THE RETURN

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State Section

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State Tax Return

How to start AZ Tax Return (AZ Form 140)

Enter the Form Number...

- Basic Information
- Federal Section
- Health Insurance
- State Section
- Summary/Print
- e-File
- 2016 Amended Return
- Save & Exit Return
- Help & Support

Your Federal Return is Complete!

Congratulations! You have completed your Federal Return.

We're ready to add your state return. We'll automatically transfer all the necessary information into your state return for you.

Please choose from the following options:

- Add a State Return to your account.

  The following states do not have state income tax returns that can be filed through TaxSlayer Pro: **Alaska, Florida, Nevada, New Hampshire, South Dakota, Tennessee, Texas, Washington and Wyoming**
- Skip the State Return process and Continue to the Summary.
- Return to the Federal Section to review or make changes to your Federal Return.

Return to Federal Section | Add State Return(s) | Continue to Summary

Click her to start State Tax Return

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State Tax Return

How to start AZ Tax Return (AZ Form 140)

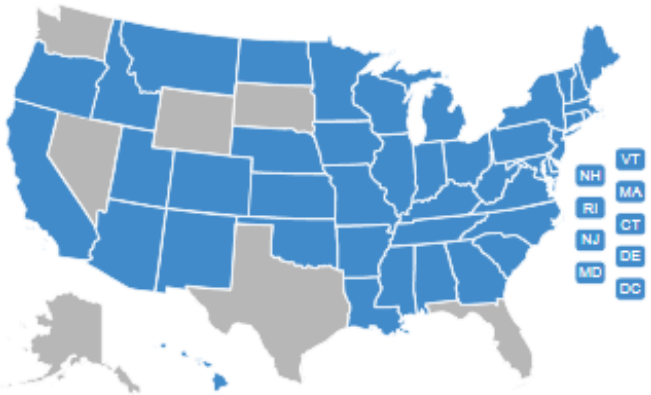
Enter the Form Number...

- Basic Information
- Federal Section
- Health Insurance
- State Section
- Summary/Print
- e-File
- 2016 Amended Return
- Save & Exit Return
- Help & Support

Select your State Return

Please select the state that you would like to complete below.

Only states that accept tax returns for which you have not already created a state tax return are listed here. The following states **do not** have individual income tax returns:
Alaska, Florida, Nevada, New Hampshire, South Dakota, Tennessee, Texas, Washington and Wyoming



Choose State

Arizona

Use the drop-down box to select "Arizona" to start Arizona state tax return

Cancel Continue

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State Tax Return

How to start AZ Tax Return (AZ Form 140)

Select your Arizona Return Residency

Please choose a return type

- (●) **Resident:** You are a Resident of Arizona if your domicile/permanent home is in Arizona regardless of brief, infrequent absences.
- ( ) **Part Year:** You are a Part Year Resident of Arizona if you moved into Arizona with the intent of becoming a resident or you moved out of Arizona with the intent of giving up your residency.
- ( ) **Non-Resident:** You are a Nonresident of Arizona if you do not maintain a permanent place to live in Arizona during the tax year.

Cancel Continue

State Tax Return

How to start AZ Tax Return (AZ Form 140)

Arizona State Return

Basic Information	BEGIN
Additions to Income	BEGIN
Subtractions from Income	BEGIN
Itemized Deductions	BEGIN
Credits	BEGIN
Voluntary Contributions	BEGIN
Payments and Penalties	BEGIN
Miscellaneous Forms	BEGIN

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SUMMARY/PRINT

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Summary/Print

TaxSlayer Screenshot

Calculation Summary

$3,495 Federal Refund

$2,817 AZ Refund Amount

Go To Last Checkpoint

View/Print Return

REASONS FOR NO EARNED INCOME CREDIT (EIC)

- Investment Income is Greater than $3,400.
- 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

Continue

Form 1040 page: 1 2

Summary View

Form **1040** Department of the Treasury—Internal Revenue Service (99) **U.S. Individual Income Tax Return** 2016 OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2016, or other tax year beginning , 2016, ending , 20 See separate instructions.

Your first name and initial	Last name	Your social security number
YORK	YOUNG	211 00 8748
If a joint return, spouse's first name and initial	Last name	Spouse's social security number
XUAN	YOUNG	212 00 8749

Home address (number and street). If you have a P.O. box, see instructions. 1 MAIN — Apt. no. — Make sure the SSN(s) above and on line 6c are correct.

City, town or post office, state, and ZIP code. If you have a foreign address, also complete spaces below (see instructions). Glendale AZ 85302

Foreign country name — Foreign province/state/county — Foreign postal code

Presidential Election Campaign Check here if you, or your spouse if filing jointly, want $3 to go to this fund. Checking a box below will not change your tax or refund. ☐ You ☐ Spouse

Filing Status Check only one box.

1 ☐ Single
2 ☒ Married filing jointly (even if only one had income)
3 ☐ Married filing separately. Enter spouse's SSN above and full name here. ▶
4 ☐ Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
5 ☐ Qualifying widow(er) with dependent child

Exemptions

6a ☒ **Yourself.** If someone can claim you as a dependent, **do not** check box 6a
b ☐ **Spouse**

c **Dependents:**

(1) First name Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) ✓ if child under age 17 qualifying for child tax credit (see instructions)
SADIE BURKE	XXX XX 1234	Niece	☐
CHERYL COOK	XXX XX 1234	Grandchild	☐
GRANT ALLEN	XXX XX 1234	Grandchild	☒
			☐

If more than four dependents, see instructions and check here ▶ ☐

Boxes checked on 6a and 6b	2
No. of children on 6c who: - lived with you	3
- did not live with you due to divorce or separation (see instructions)	0
Dependents on 6c not entered above	0
Add numbers on lines above ▶	5

d Total number of exemptions claimed

Income

Attach Form(s) W-2 here. Also attach Forms W-2G and

7	Wages, salaries, tips, etc. Attach Form(s) W-2		7	52,435 00
8a	**Taxable** interest. Attach Schedule B if required		8a	1,968 00
b	**Tax-exempt** interest. **Do not** include on line 8a	8b 123 00		
9a	Ordinary dividends. Attach Schedule B if required		9a	861 00
b	Qualified dividends	9b 724 00		
10	Taxable refunds, credits, or offsets of state and local income taxes		10	208 00

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Summary/Print

TaxSlayer

There are two ways of printing a tax returns for taxpayer

1. When you have a client's tax return open, in the e-file section click on "Print return". Wait until the PDF file is created and press "Print Results ".

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Summary/Print

TaxSlayer

There are two ways of printing a tax returns for taxpayer

2. Go to Main screen, select “Client Search”, find the taxpayer and click on the “Print” icon, select the appropriate print set.

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Summary/Print

TaxSlayer Screenshot

Office Client List

2016 Client Tax Return List

Filter by Status Any Status

Filter by Return Tag Any Tag

☐ **Do Not Show Deactivated Returns**

Date From: mm/dd/yyyy

Date To: mm/dd/yyyy

Search Client list

Show 10 entries

Previous 1 2 Next

Showing 1 to 10 of 13 entries

SSN	FIRST	LAST	PHONE	PREPARER	STATUS		
XXX-XX-1234	JEREMY	CLARK	(999) 999-9999	IRS Preparer	In Progress		Tools Select
XXX-XX-1234	GAIL	ARCHER	(999) 999-9999	IRS Preparer	In Progress		Tools Select
XXX-XX-0009	JUSTIN	REEDLEY	(480) 480-4800	IRS Preparer	In Progress		Tools Select
XXX-XX-8748	YORK	YOUNG	(123) 456-7890	IRS Preparer	In Progress		Tools Select
XXX-XX-1118	AUSTIN	DRAKE	(480) 480-4800	IRS Preparer	In Progress		Tools Select

Summary/Print

TaxSlayer

Any Questions?

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E-File

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E-File

TaxSlayer Screenshot

E-File

Return Type

Your return is now ready to be *e*-Filed to the IRS.

Please make sure that all information you enter below is correct.

In order for us to transmit your client's return to the IRS you must complete all Steps in the e-File Process.

CAUTION: Your client's return will not be sent to the IRS unless you complete ALL steps. None of the information is saved until all information is entered and the "Continue" button below is clicked.

To continue the e-File process, please first select a return type and the form will ask for all required information.

Refund summary

☐ **Send State Only**

Federal Return Type

E-file: Direct Deposit

Depending on how the taxpayer answers, please choose appropriate choice from the drop down box.

E-File

TaxSlayer Screenshot

Tax Preparation and E-File Information

Refund summary

Fees

Calculated Prep Fee	$ 0.00
Preparer Fee	$ 0.00
Electronic Filing Fee	$ 0.00
Total	$ 0.00

Client Email

Taxpayer's PIN

18748

Spouse 's PIN

18749

ERO's PIN

98765

fppt.com

E-File

TaxSlayer Screenshot

E-File

Return Type

Tax Preparation and E-File Information

State Return(s)

Choose how you would like to file your state returns:

State	Refund/Due	Return Type
AZ	Refund: $ 2817.00	E-file: Direct Deposit

By using a computer system and software to prepare and transmit this return electronically, I consent to the disclosure of all information pertaining to my use of the system and software to create this return and to the electronic transmission of this tax return to the Department, as applicable by law.

Next

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E-File

TaxSlayer Screenshot

Taxpayer Bank Account Information

Note: This bank information MUST be accurate for your return to process correctly.

Name of Bank

JP Morgan

Type of Account

Checking

Routing Transit Number

••••••••••

Confirm Routing Transit Number

122100021

Bank Account Number

••••••••••

Confirm Bank Account Number

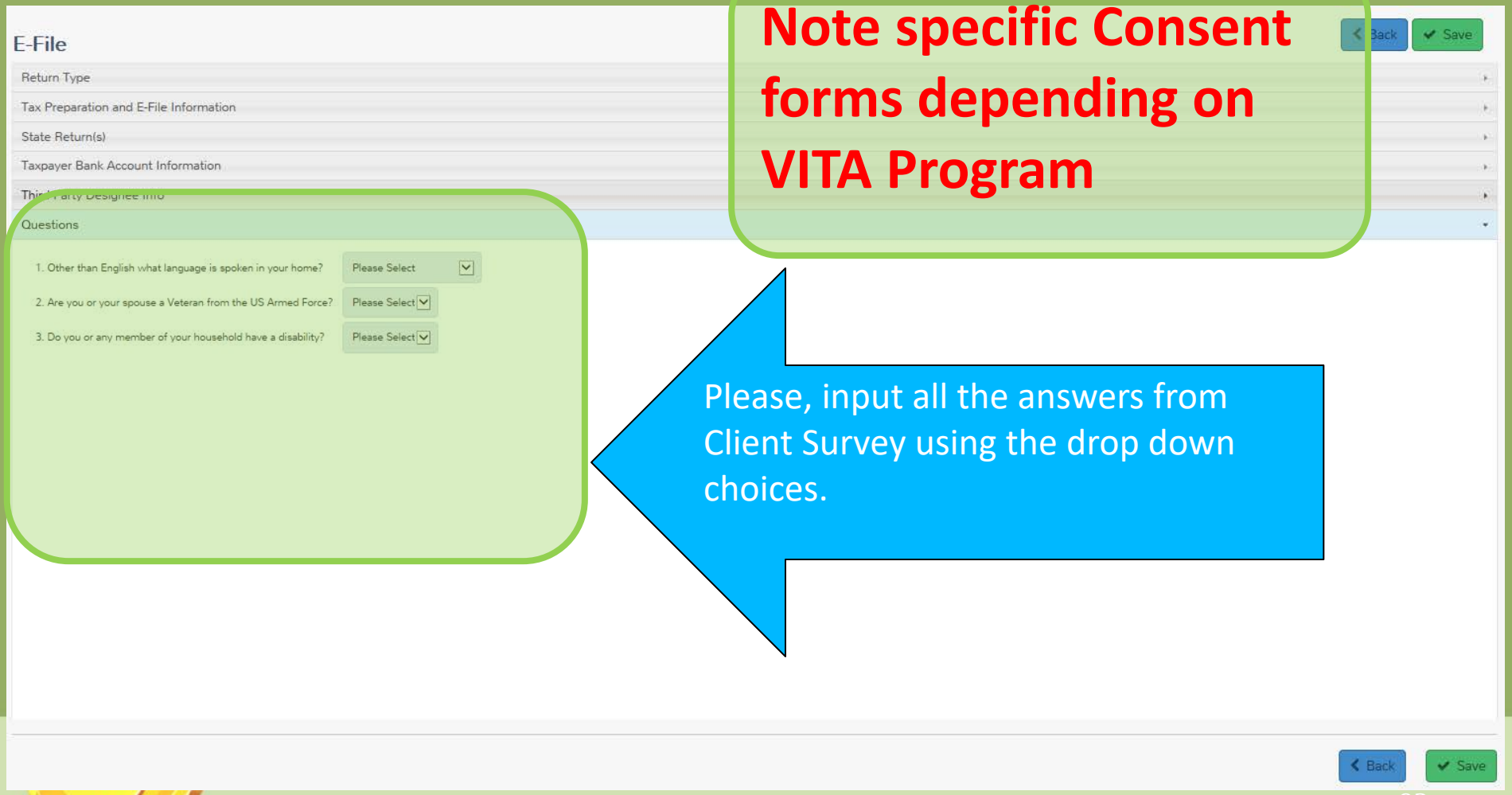
123456789

Next

Double & triple check the bank account information. One number off the refund will end up in wrong account, and we can't help getting the refund back.

E-File

TaxSlayer Screenshot



Note specific Consent forms depending on VITA Program

Please, input all the answers from Client Survey using the drop down choices.

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E-File

TaxSlayer Screenshot

Third Party Designee Info

This information is optional

First Name

Designee Last Name

Designee Phone

( ) -

Designee Pin

Next

Do not check anything, just click “NEXT” button

fppt.com

E-File

TaxSlayer Screenshot

State ID **(Optional)**

You may provide your state issued id or drivers license in the section below. This information is optional but may assist the state in verifying your identity and processing your return.

Taxpayer ID Information

Type

Please Select

Number

IssueDate

mm/dd/yyyy

ExpireDate

mm/dd/yyyy

☐ **No Expiration date**

IssueState

Please Select

This screen is optional. Do not input Taxpayer and/or spouse's information.

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E-File

TaxSlayer Screenshot

Submission

You can't efile. However, you can still mark the return complete and save your work.

Please review all information on this screen. To finalize your return please click on the submit button located below.

One Copy - Federal and State

Print Return

Electronic Signature

Taxpayer : Sign

Spouse: Sign

ERO Information

Efin: 369258
Company Name: Practice Lab

Client Information

Client Name: YORK YOUNG

This screen is the last screen before this return is "Ready for Review". So, please double check and make sure this screen accurately summarizes all of your hard work.

Return Information

Type of Return: E-file: Direct Deposit
Federal Refund: $3,495.00

Tax Preparation Charges:

Preparer Fee: $0.00
Electronic Filing Fee: $0.00
Total Fees: $0.00

☐ **Mark Paid**

☐ **Mark Complete**

Form 8879

Taxpayer's Pin: 18748
Spouse's Pin: 18749
ERO's Pin: 98765

Personal Bank Account

Bank Name: JP Morgan
Routing Number: 122100024
Account Number: 123456789
Account Type: Checking

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E-File

TaxSlayer Screenshot

Return/Transmit Status

Is Complete ☐

Ready For Review ☐

When all information is correct and this tax return is ready for review, please mark this return as “Ready for Review”

Return Tag(s)

☐ DELETE ☐ INCOMPLETE ☐ PAPER ☐ READY TO EFILE

☐ STATE ONLY ☐ WAITING FOR SIGNATURE

A sample of return tags.

PAPER FILE COPY Print Return

Save And Return Back Save And Exit Return

fppt.com

E-File

TaxSlayer Screenshot

Return Tag(s)

- [ ] Missing Info. / Will Return
- [ ] Taxslayer system down unable to proceed with return
- [ ] SPEC Oversight Review
- [ ] AZ Unemployment HOLD awaiting legistation.
- [x] Needs Signature
- [ ] 140 PTC Only
- [ ] Paper Return
- [ ] Reject - Unable to Contact Client
- [ ] State Only
- [ ] Do Not Transmit
- [ ] Reject - Client Contacted
- [ ] Tax Payer Refused to File
- [ ] Amended Return
- [ ] Reject/Retransmited Accepted
- [ ] Letter Sent to Client - Action needed/return not Transmitted
- [ ] Received Letter from IRS
- [ ] Taxslayer down unable to move forward with return

Another sample of return tags.

One Copy - Federal and State | Print Return

Save And Return | Back | Save And Exit Return

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E-File

TaxSlayer

Any Questions?

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Finishing Return

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Finishing Returns

TaxSlayer

Difference between “Tag” and “Status” in TaxSlayer

Tags: internal notes for us to use (Examples: needs more info, Spouse’s signature required, Delete return per taxpayer’s request…) *(will be set-up by the site coordinator)*

Status: Pre-established by TaxSlayer to note the status of the return (example: In Progress, Ready for review, Complete, Accepted, Rejected, etc.)

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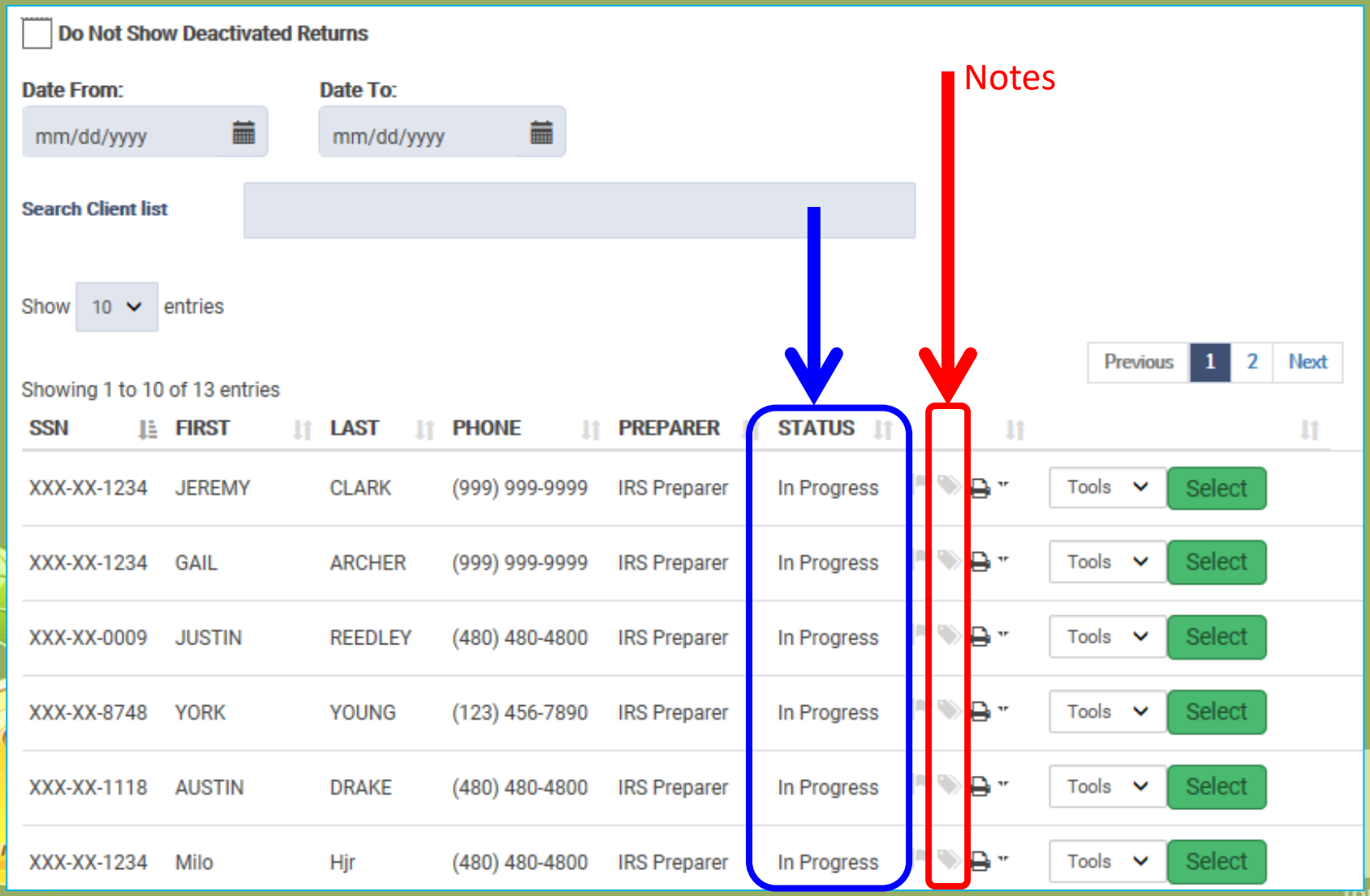
Finishing Returns

TaxSlayer Screenshot



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Finishing Returns

TaxSlayer

It is important to attach notes to the tax return to explain to others who will view the return what you chose to do with the return.

If a return is rejected, we need to fix the issue and resubmit (e-file) within 24 to 48 hours. This is normally done by the Site Coordinator.

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Finishing Returns

TaxSlayer Screenshot

Click on the drop-down arrow.

2018

Help & Support | Abigail Adams | Logout

Calculation Summary

$0
AGI Amount

$0
Federal Refund

N/A
Refund Amount

GO TO LAST CHECKPOINT

VIEW/PRINT RETURN

REASONS FOR NO EARNED INCOME CREDIT (EIC)

There are No Qualifying Children Listed.
Taxpayer's Age is Not Between 25 and 64.
Your Adjusted Gross Income or Earned Income is Less than or Equal to $0.

BACK

CONTINUE

Form 1040 page: 1 2 3

Prior Year Comparison | Summary View

Form **1040** Department of the Treasury—Internal Revenue Service (99)
U.S. Individual Income Tax Return
2018
OMB No. 1545-0074
IRS Use Only—Do not write or staple in this space.

Filing status: [X] Single [ ] Married filing jointly [ ] Married filing separately [ ] Head of household [ ] Qualifying widow(er)

Your first name and initial	Last name	Your social security number
Abigail	Adams Age: 23	611 00 1234

Your standard deduction: [ ] Someone can claim you as a dependent [ ] You were born before January 2, 1954 [ ] You are blind

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

Finishing Returns

2018

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Your Office
Scanned Documents
¿Sí hablas Español?
Notes
Helpful Tools
Quick File
Save & Exit Return

Calculation Summary

$0
AGI Amount

$0
Federal Refund

GO TO LAST CHECKPOINT

REASONS FOR NO EARNED INCOME CREDIT (EIC)

There are No Qualifying Children Listed.
Taxpayer's Age is Not Between 25 and 64.
Your Adjusted Gross Income or Earned Income is Less than or Equal to $0.

BACK

CONTINUE

Form 1040 page: 1 2 3

Prior Year Comparison | Summary View

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

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Finishing Returns

TaxSlayer

2018

Help & Support | Abigail Adams | Logout

Calculation Summary

$0 $0

N/A
Refund Amount

GO TO LAST CHECK

VIEW/PRINT RETURN

REASONS FOR NO

There are No C
Taxpayer's Age
Your Adjusted

BACK

CONTINUE

Form 1040 page: 1

Year Comparison | Summary View

Form 1040

Filing status:

Your first name and initial

Last name

Your social security number

Add a new note

Note Name

Text for this note

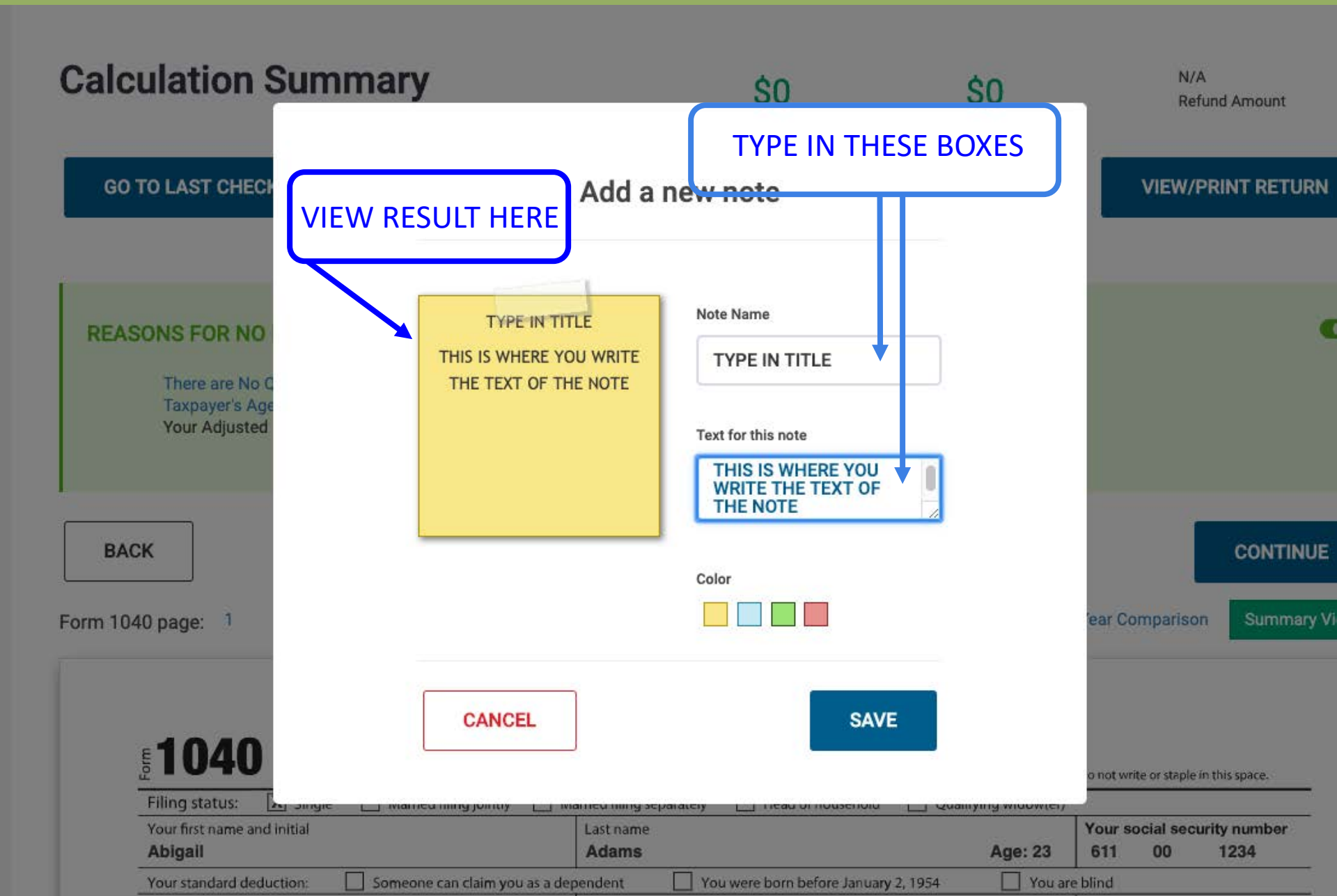
Color

CANCEL

SAVE

Note Name should start with TY 2021.

Finishing Returns



Finishing Returns

TaxSlayer

Any Questions?

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TaxSlayer – Practice Lab

As long as we are here in the Practice Lab we might as well do our first return!!

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Homework

110

- **Publication 6744** -- Look through the “Advanced Course Scenarios”.
- **Publication 4012** – Read Tabs A, B, C, D, and E.
- **Open the pdf file of Pub. 4012 and use the “control+F” keys to do a search for the keyword “relative”.**

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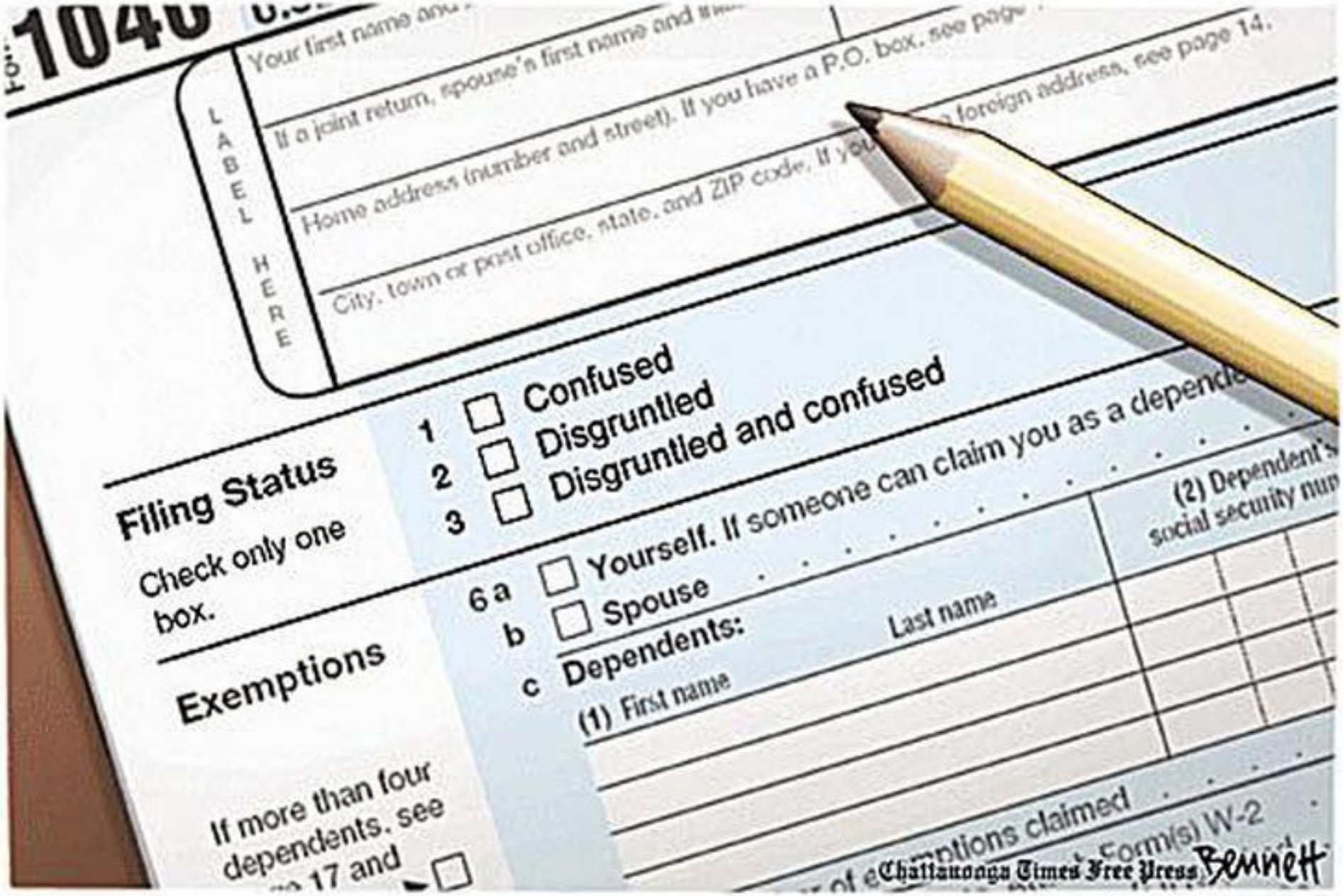
1040
Your first name and
If a joint return, spouse's first name and
Home address (number and street). If you have a P.O. box, see page
foreign address, see page 14.
City, town or post office, state, and ZIP code. If you
LABEL HERE
Filing Status
Check only one box.
1 Confused
2 Disgruntled
3 Disgruntled and confused
Exemptions
6a Yourself. If someone can claim you as a depende
b Spouse
c Dependents:
(1) First name
Last name
(2) Dependent's social security num
If more than four dependents, see
17 and
Form(s) W-2
Chattanooga Times Free Press
Bennett

Next Session Preview

1. Review Homework
2. Intake & Quality Review
3. Intake Test
4. Filing Status
5. Dependents
6. Income - Salaries & Tips
7. Income - Business
8. Homework Assignment

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Tax Year 2021
TAX LAW
PROGRAM TRAINING
Session 1

Thank you for volunteering!!!!!

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