Tax Year 2021
TAX LAW
PROGRAM TRAINING
Session 6

City of Phoenix VITA Network 2021

AGENDA
Session 6

1. Review homework
2. Customer Service
3. Do It Yourself Services (FSA)
4. TaxSlayer Updates
5. Review of Advanced ?
6. Volunteer Agreement Form
7. Resources for VITA Volunteers

Customer Service

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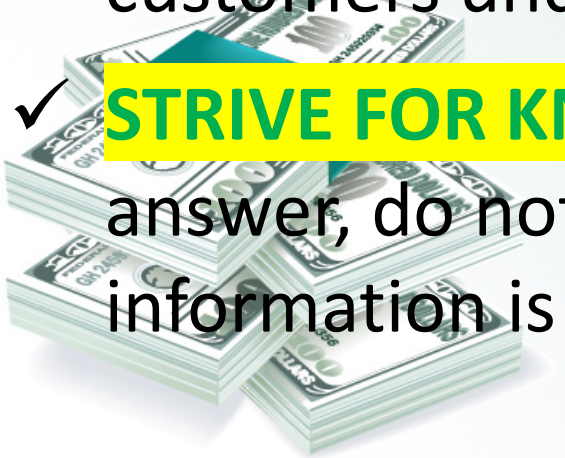
Customer Service

- ✓ **START WITH A SMILE** - Smiling immediately puts customer at ease)
- ✓ **BE CIVIL AND RESPECTFUL** - Treat all taxpayers professionally, with courtesy and respect. Do not make assumptions.
- ✓ **EXPLAIN THE PROCESS** - Make sure that your customers understand your processes and procedures.
- ✓ **STRIVE FOR KNOWLEDGE** - If you don't have an answer, do not hesitate to ask for help. Correct information is the key.



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Customer Service

- ✓ **LISTEN** - Listen to the customer carefully. Ask appropriate questions. Clarify if you're unsure. Customer will be telling you their financial story
- ✓ **TREAT CUSTOMERS WITH EMPHATHY AND UNDERSTANDING** - Customer wants to know that you understand their situation and their special circumstances.
- ✓ **LOOK FOR WAYS TO GET TO YES** - Explore all applicable regulations in order to find all available solutions to help your customer.

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Customer Service

- ✓ **OWN UP TO MISTAKES WITH HUMILITY** - We all make mistakes, when those occur: apologize, take ownership and solve the problem.
- ✓ **MAKE RELATIONSHIPS MATTER** - We all need to remember that our customers' success is our success and the success of our program.

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Customer Service

- ✓ **Reasonable accommodation interactive process**:
  - ➢ Communicate with the taxpayer to assess the need for a reasonable accommodation.
  - ➢ Determine an **effective** accommodation, one which adequately removes the barrier to equal access to benefits and services.
  - ➢ Provide the accommodation in a timely manner, using staff, community or other available state or local resources.

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Customer Service

- ✓ **Examples of reasonable accommodations include**:
  - Providing qualified sign language interpreters
  - Video relay service/video remote interpreting
  - Braille materials
  - Large print materials with high contrast reading materials to taxpayers

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Customer Service

- ✓ **Examples of reasonable accommodations include**:
  - Allowing service animals into public access areas
  - Accessibility outside buildings (e.g. reserved parking, curb cuts, doors, walkways, signage at entrances)
  - Accessibility inside buildings (e.g. signage, elevators, restrooms, adequate space for wheelchairs and other mobility devices)

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Customer Service

- Please, do not argue with the customer
- If customer is being loud, take them outside away from the crowd
- Get the Site Coordinator right away
- Customer is always right, but try to solve issue
- If customer threatens you, get Site Coordinator first, then call VITA Site Coordinator ASAP

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Customer Service

Privacy & Confidentiality

- **Emphasize shredding documents, not leaving any forms or personal information behind**
- **What we keep (temporarily) – varies from site to site**
- **Safeguard the confidentiality of taxpayer information**

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Customer Service

Steps to great Customer Services

Any Questions?

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FSA - 2021

Facilitated

Self

Assistance

(Do-It-Yourself Taxes)

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FSA (Do-It-Yourself Taxes)

People pump their own gasoline, use automatic bank tellers, and print boarding passes at airline kiosks. They even scan, pay, and bag their own groceries.

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FSA (Do-It-Yourself Taxes)

Adding a self-service option expands on the IRS' current tax assistance programs. Previously, volunteer tax preparation sites used <u>one volunteer to assist one taxpayer</u> at a time.

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FSA (Do-It-Yourself Taxes)

FSA allows one volunteer to facilitate and help many taxpayers at once. This not only increases efficiency in sites, but also teaches people about their taxes.

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FSA (Do-It-Yourself Taxes)

- To learn how to do a return using FSA, we encourage all volunteers to do their own return using the FSA link provided by the Site Coordinator.
- Although not required, this will teach you how to help clients who want to use this system.
- Once you set up your own FSA account, the software is identical to what we use at VITA sites.

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FSA (Do-It-Yourself Taxes)

Tips for Volunteer facilitators

- Get the correct website address from your site coordinator.
- Give each client a handout to work from.
- If a client sees a page charging them a fee, they are on the wrong website and must start over at the correct website.

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FSA (Do-It-Yourself Taxes)

Tips for Volunteer facilitators

- If a client is filing a return that would be **OUT-OF-SCOPE** for VITA, be sure to tell the client that we are not trained to provide assistance in that area.

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FSA (Do-It-Yourself Taxes)

Tips for Volunteer facilitators

- Ask clients “Do you have any other forms that may need to be entered or that you were unsure about what to do with them?” Do this prior to printing and e-filing the return.

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FSA (Do-It-Yourself Taxes)

Tips for Volunteer facilitators

- Remind clients before they leave that they will need to return to a VITA site next year to start their tax return for free.

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FSA (Do-It-Yourself Taxes)

1. Create an account. Make sure you remember your:

Username: _____

and

Password: _____

Write the information on the handout and keep it with your tax forms.

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The following slides are FSA screenshots and were accurate during last year's tax filing season.

Sign In

Need a TaxSlayer account? Create account.

Username

Password

Forgot Username | Forgot Password

SIGN IN

By clicking 'Sign In', you agree to TaxSlayer's License Agreement, Privacy Policy, and agree to receive marketing emails related to your account. You can unsubscribe at any time.

Copyright © 2020 TaxSlayer

Create your account.

Already have an account? Sign In

Email address

Username

Choose password

Mobile phone (recommended)

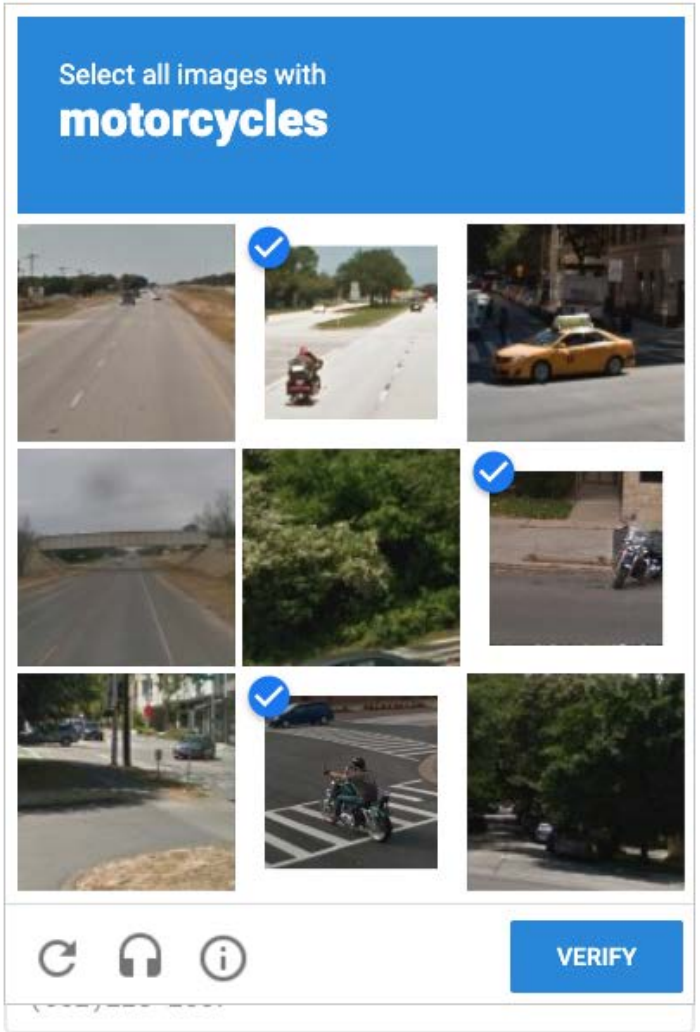
(___)___-____

☐ Verify my account with text message. Standard call, messaging, or data rates may apply.

CREATE ACCOUNT

By clicking 'Create account', you agree to TaxSlayer's License Agreement, Privacy Policy, and agree to receive marketing emails related to your account. You can unsubscribe at any time.

Copyright © 2020 TaxSlayer



Verify my account with text message. Standard call, messaging, or data rates may apply.

CREATE ACCOUNT

By clicking 'Create account', you agree to TaxSlayer's License Agreement, Privacy Policy, and agree to receive marketing emails related to your account. You can unsubscribe at any time.

Check your phone

Enter the verification code we sent you to verify

We sent a code to:

(602) 228-2557

Enter the 6-digit code

Resend Verification Code

Skip

VERIFY

Copyright © 2020 TaxSlayer

Success! Your TaxSlayer account has been created.

Now, let's keep going.

CONTINUE

You deserve the best.

We’ve created an experience specific to your tax filing needs. Your autograph unlocks:

- Option to pay with your refund
- Personalized tax tips and reminders specific to you
- More ways to receive your refund
- Access to new tools that make filing faster and easier
- Resources to help you manage your financial situation year-round

CONTINUE

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Let's get this out of the way.

Review the legal info below, give us your autograph, and you'll be on your way to a faster, easier tax filing experience – created with you in mind.

Sign by typing your name and the date in the boxes below

Use of Information

Section 301-7216 of the Internal Revenue Code specifically governs the use and disclosure of Tax Return Information. Some states may also have additional laws and regulations related to use and disclosure of the same information. We use your Tax Return Information only in accordance with those applicable laws and regulations to prepare and assist in preparing your tax return, to provide services associated with preparing your tax return, and to provide you with other products and services you specifically request or consent to.

We use the information you provide (discussed above) to complete services and products you request. That is, we may use your information to show you additional products (if applicable) such as options to pay for tax preparation services (e.g. Refund Transfer), various ways to receive a refund disbursement, personalized tax tips, and other relevant products and services based upon your Tax Return Information. These offers may come from us or a third-party service provider. As permitted by law, we may also

PRINT

Full Name *

Abigail A Adams

Date *

5 14 2020

☐ I am filing with my spouse.

CONTINUE

Choose the TaxSlayer product best for you

Select Classic to get everything you need to file your tax return - for less.

Recommended for you

Simply Free

For those with a simple tax situation. Includes one free state return.

$0

✓ State Included

FILE FOR FREE

- ✓ Prepare, print, and e-file
- ✓ Includes W-2 income
- ✓ Student loan interest and education expenses
- ✓ Free phone and email support

Classic

All tax situations. The absolute best value for your max refund.

$17

+ States Additional

START FOR FREE

Everything in *Simply Free* **plus all the forms:**

- ✓ Includes all credits like Earned Income Tax Credit and Child Tax Credit
- ✓ Includes all deductions and adjustments to income

Premium

Priority support when you need it. Includes live chat and Ask a Tax Pro.

$37

+ States Additional

START FOR FREE

Everything in *Classic* **plus extra support:**

- ✓ IRS Audit Assistance for 3 full years
- ✓ Ask a tax pro your most difficult questions

Self-Employed

Best for contractors, 1099ers, side hustlers, and the self-employed.

$47

+ States Additional

START FOR FREE

Everything in *Premium* **plus self-employed help:**

- ✓ Access to a tax pro with self-employed expertise
- ✓ Guidance with 1099 income
- ✓ Maximize work expense

Want to get a head start on your Tax Return?

Easily import your personal information by uploading a pdf of last year's tax return.

Drag and Drop PDF here, or
click to upload

You may upload 1 PDF file (up to 5 MB).

VIEW RESULTS

Skip

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Personal Information

Taxpayer's Information

Primary taxpayer first name

MI

Last name

Suffix (Jr, Sr, etc.)

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

-

-

Date of Birth

MM DD YYYY

Occupation

BACK

Skip

CONTINUE

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Personal Information

Mailing Address

Country

United States of America

Address (street number & name)

Apartment (provide apartment number only)

ZIP code

-

City, town, or post office

State

- Please Select -

Residency Status

- Please Select -

☐ I have a stateside military address.

BACK

Skip

CONTINUE

Personal Information

Phone Number IRS requirement for e-filing. You can enter it now and save time later.

Mobile Phone Number

(___) ___ - ____

☐ I want to receive text notifications on my cellular phone, and I agree to the text messaging Terms & Conditions.

Text messaging is the most secure way of ensuring access to your return, also text messaging is the most reliable method for us to contact you regarding your tax return.

Daytime Telephone Number

(602) 228-2557

BACK CANCEL CONTINUE

Additional Information

Taxpayer's Information

Check All That Apply:

- [ ] Abigail can be claimed as a dependent on someone else's return. Learn more
- [ ] Abigail was over age 18 and a full-time student at an eligible educational institution. Learn more
- [ ] Abigail is blind.
- [ ] Abigail is deceased.
- [ ] Abigail wishes to contribute $3 to the Presidential Election Campaign Fund.
- [ ] Abigail served in a combat zone during the current tax year. Learn more
- [ ] Abigail was affected by a natural disaster during the current tax year.
- [ ] Abigail received, sold, sent, exchanged, or otherwise acquired financial interest in virtual currency during the current tax year.

BACK

Skip

CONTINUE

What's your filing status? Learn more

- Single
- Married Filing Jointly
- Married Filing Separately
- Head of Household
- Qualifying Widow(er) with Dependent Children

Need help determining your filing status?

FILING STATUS WIZARD

BACK

CONTINUE

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Dependents or Qualifying Person(s)

Individuals who rely on you for 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. Learn more

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

YES NO

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IRS Identity Protection PIN

Did you or anyone on your tax return receive a CP01A notice from the IRS containing a 6-digit Identity Protection PIN? Learn more

- ○ Yes, someone on my return received an Identity Protection PIN.
- ○ No, no one on my return received an Identity Protection PIN.

BACK

Skip

CONTINUE

Let's do this! #slayit

Now that we know more about you, let's dig into your tax return.

CONTINUE

Know which forms you need?

Search for them with Quick File, and we'll take you directly to them.

Do you want to use Quick File? *

- ◯ Yes
- ◯ No

BACK

CONTINUE

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Let's look at the money you earned

How would you like to enter your income?

Click here

I want to be guided
I want to be guided by answering questions about my tax situation

Select my forms
I want to select my forms from a list and enter the information myself

BACK

Skip

CONTINUE

INCOME GUIDE

Wages & Salary

Form W-2

Do you have any W-2s to enter? Learn more

- ◯ Yes
- ◯ No

BACK

Restart/Exit Income Guide

CONTINUE

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W-2

Check any that apply:

Most people won't check these boxes.

- ☐ This is a corrected W-2
- ☐ This is a substitute W-2
- ☐ This is a railroad W-2

b Employer identification number (EIN) *

c Employer's name *

Country *

United States

Address (number and street) *

ZIP Code *

City *

State *

-- Please Select --

d Control number - *Not required for filing taxes online.*

Start here and fill in the boxes down the screen and keep scrolling downward to the next slide or use the tab key to move from box to box.

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1 Wages, tips, other

$

2 Federal tax withheld

$

3 Social security wages

$

4 Social security tax withheld

$

5 Medicare wages and tips

$

6 Medicare tax withheld

$

7 Social security tips

$

8 Allocated tips

$

9 IRS verification code

10 Dependent care benefits

$

11 Nonqualified plans

$

Unreported tips

$

12a - Code

Keep filling in the boxes and keep scrolling downward to the next slide.

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Railroad tier 1 wages

$

Railroad tier 1 tax withheld

$

Railroad medicare wages

$

Railroad medicare tax withheld

$

15 State

-- Please Select --

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

Add another state

Keep filling in the boxes and then click on "Continue".

CANCEL

CONTINUE

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If you need to add another W-2, click here.

If you need to edit or delete this W-2, click here.

W-2 Wage Statement

Add a W-2 Wage Statement

Taxpayer Sonic Corp	Income	**$21,840.00**	Tax Withheld	**$2,184.00**

BACK

CONTINUE

INCOME GUIDE

Prior Year State & Local Refunds

Form 1099-G Box 2

Did you receive a state or local refund for tax year 2018? Learn more

- Yes
- No

BACK | Restart/Exit Income Guide | CONTINUE

INCOME GUIDE

Interest & Dividend Income

Forms 1099-INT, 1099-OID, 1099-DIV

Did you have any interest or dividend income? Learn more

- Yes
- No

BACK | Restart/Exit Income Guide | CONTINUE

Let's see how we can cut your tax bill

How would you like to enter your deductions?

Click here

I want to be guided

I want to be guided by answering questions about my tax situation

Select my forms

I know which credits and deductions I qualify for and want to enter the information myself

BACK

or

Skip Deductions

CONTINUE

Other Taxes

Additional Taxes on Qualified Plans and Other Accounts

Reported on Form 5329

BEGIN

Alternative Minimum Tax

Reported on Form 6251

BEGIN

Household Employment Taxes

Reported on Schedule H

BEGIN

Net Investment Income Tax (Individuals, Estates, & Trusts)

Reported on Form 8960

BEGIN

Parents' Election to Report Child's Interest and Dividends

Reported on Form 8814

BEGIN

Repayment of First-Time Homebuyer Credit

Reported on Form 5405

BEGIN

Self-Employment Tax

Reported on Schedule SE

BEGIN

Social Security and Medicare Tax on Unreported Tip Income

Reported on Form 4137

BEGIN

Tax For Certain Children Who Have Unearned Income

Reported on Form 8615

BEGIN

Payments and Estimates

Amount Paid with Extension

Amount paid with Form 4868

BEGIN

Apply Overpayment to Next Year's Taxes

Option to apply all or part of your refund to next year's taxes

BEGIN

Federal Estimated Tax Payments

Federal tax payments already made for 2019

BEGIN

Other Federal Withholdings

Federal withholdings you haven't already entered

BEGIN

Other State Withholdings

State withholdings you haven't already entered

BEGIN

State Estimated Tax Payments

State tax payments already made for 2019

BEGIN

Underpayment of Estimated Tax

Determine if you owe a penalty for underpayment of estimated tax and next steps

BEGIN

Vouchers for 2020 Estimated Tax Payments

Print vouchers for estimated tax payments

BEGIN

BACK

CONTINUE

Miscellaneous Forms

Allocation of Tax Amounts for Individuals in Certain States

Reported on Form 8958 (Only for married filing separately and some domestic partnerships)

BEGIN

Application for Automatic Extension of Time to File

Applied for on Form 4868

BEGIN

Injured Spouse Allocation

Reported on Form 8379

BEGIN

Installment Agreement Request

Requested on Form 9465

BEGIN

IRS Identification Pin

PIN needed if you were issued a CP01A notice from the IRS

BEGIN

Statement of Person Claiming Refund Due a Deceased Taxpayer

Claimed on Form 1310

BEGIN

BACK

CONTINUE

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Health Insurance Questionnaire

Did you purchase health insurance via HealthCare.gov or a State Marketplace? * Learn more

- Yes
- No

BACK

CONTINUE

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Your Free Federal Return is Complete!

Congratulations! You have completed your FREE federal return.
We're ready to add your state return. We will automatically transfer all the neccesary information from your federal tax return to your state tax return for you.

Please choose from the following options:

- Add a state return to your account for $0. Additional states will be $39 each.

  The following states do not have state income tax returns that can be filed through TaxSlayer: **Alaska, Florida, Nevada, New Hampshire, South Dakota, Tennessee, Texas, Washington and Wyoming**

- Skip the state return, and continue to the summary.
- Return to the federal section to review or make changes to your free federal return.

RETURN TO FEDERAL SECTION

CONTINUE TO SUMMARY

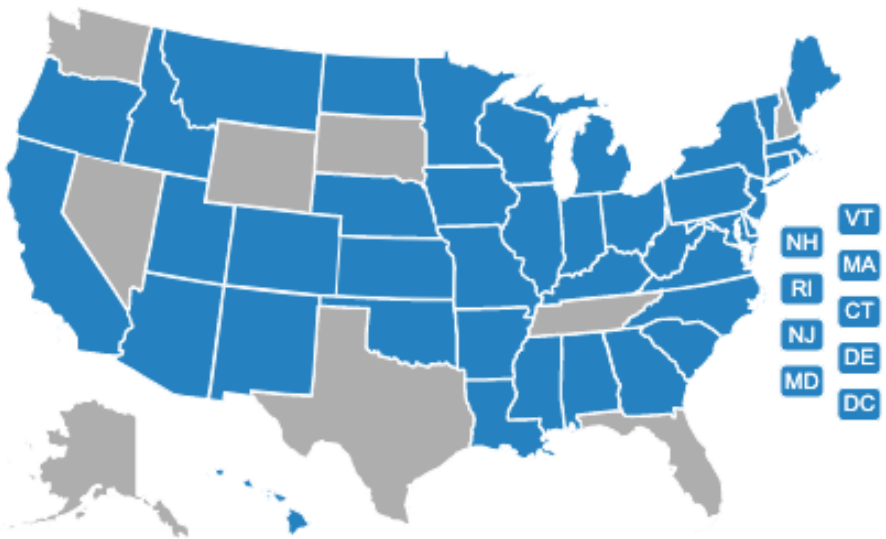
ADD STATE RETURN(S)

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

- Please Select -

CANCEL

CONTINUE

Select your Arizona Return Residency

Please choose a return type

- ◯ **Resident:** You are an Arizona resident if you where permanently domiciled in Arizona for more than 9 months.
- ◯ **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

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Arizona State Return

We have automatically transferred some information from your Federal tax return to your Arizona state tax return for you.

CONTINUE

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Arizona Return

Enter your Last Name(s) used in prior years if different from name(s) used on this years return

Is this your first time filing an Arizona return?

--Select--

Enter Active Duty Military/Reserve/National Guard Pay

$

CONTINUE

Congratulations! You have completed your standard Arizona state return!

Would you like to add any of the following items or any additional items not listed below to your Arizona state return?

- Paid school fees for a dependent to a public or private school
- Lived and worked on Native American land
- Donated to Military Family relief fund
- Paid Long-Term Care insurance premiums
- Age 65 or over
- Put money in a 529 savings plan
- Donated to a school in Arizona
- Gave to charities for the working poor or foster care
- Paid in to a Long-Term case savings account

NO

YES

State Return

To “Edit” or “Delete”, click here.

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

Arizona
Resident

CONTINUE

When done entering all tax forms and moving through all of the question sections:

Calculation Summary

VIEW/PRINT RETURN

Total Income show details	$54,672.00
Adjusted Gross Income show details	$54,672.00
Tax and Credits show details	$0.00
Total Tax show details	$0.00
Payments show details	$6,741.00
Refund show details	$6,741.00
Arizona Refund	485.00

BACK

Click here to move to electronically file the return

CONTINUE

Print Results

Your return is ready to be printed. Please click the button below in order to view/print your 2019 Tax Return.

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

Print your 2019 Tax Return

Alternate Method for viewing/printing your 2019 Tax Return

Adobe Acrobat Reader is required to view/print your 2019 Tax Return.

- Download the latest version of the free Adobe Reader.
- Having problems viewing/printing your 2019 Tax Return?

CONTINUE

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2019 Tax Return

prepared by,

TaxSlayer.com

You can scroll through the return or click here to print the return.

Thank you for using TaxSlayer.com and don't forget to tell your friends and family about us at www.taxslayer.com/tellafriend.

Final Steps to electronically file your tax returns.

Let's get started!

Here's what to expect:

1. Verify
your account email or mobile phone.

2. Select
the return to file.

3. Sign
your tax documents.

4. File
your return with the IRS.

CANCEL

CONTINUE

This way is faster.

We need to verify your account!

Please choose a verification method below.

LEARN MORE

Via Email

Via Text Message

Copyright © 2020 TaxSlayer | Privacy Policy

Verification code sent via text message!

Please enter the code you received via text message below:

BACK

CONTINUE

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Are you ready to file your federal return?

YES NO

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Get your refund on a TaxSlayer Visa® Debit Card powered by Green Dot.

Enjoy these benefits:

- Receiving your tax refund on your TaxSlayer card is faster than a paper check.
- Get your pay from your employer up to 2 days earlier or government benefits, like Social Security of Pension, up to 4 days earlier by signing up for ASAP™ Direct Deposit.*
- Nationwide fee-free ATM Network.**
- No overdraft fees, inactivity fees, or minimum balance requirements.**
- Use the card everywhere Visa® is accepted in the U.S.

**Subject to deposit verification and your payment provider's process and timing. This does not include your federal and state tax refund.*

***Other fees may apply. For out-of-network ATMs and bank tellers a $2.50 fee will apply, plus any additional fee that the ATM owner or bank may charge. See Deposit Account Agreement for more details.*

TaxSlayer Visa® Debit Card is issued by Green Dot Bank, Member FDIC, pursuant to a license from Visa U.S.A. Inc.

BACK

No, thanks

YES, I WANT THE CARD

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How would you like to receive your federal refund of $1,221.00?

Direct Deposit

- Goes directly into your bank account
- Zero out-of-pocket costs
- Quicker than postal mail delivery

SELECT

TaxSlayer Visa® Debit Card Powered by Green Dot

- Fast, easy and secure*
- No overdraft fees ever
- Huge free ATM network**
- Get your paycheck up to 2 days early with direct deposit***

SELECT

Postal Mailed Check

- Refund delivered within 3-4 weeks from date of IRS acceptance

SELECT

Are you interested in investing your refund?

Select **yes** if you would like to use a portion of your refund to purchase up to three savings bonds for yourself or someone else.

YES NO

BACK

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How would you like to receive your Arizona state refund?

$841.00

Mailed Check

Direct Deposit

Skip Now / File Later

BACK

Audit Assistance

Are you prepared to answer questions from the IRS?

only **$29.00**

Add Audit Assistance to get:

- A legal expert in your corner
- Support from an expert to resolve IRS inquiries
- Help safeguarding your refund
- Peace of mind with 3 years of protection*

Learn More

*Three years of protection starting from date of purchase. Applies to current tax return only.

BACK

No Thanks

+ ADD

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Legal Lightning Last Will & Testament

A will gives you security in knowing that you've made plans for the people and things you care about most.

only **$19.00**

Add a Last Will & Testament to get:

- ✓ **Document creation**
  - Choose who receives your property upon your death
  - Name an executor to distribute your property
  - Name the guardian of your minor children
- ✓ **Add your spouse**
  - If you add this today, your spouse can create their last will and testament for free
- ✓ **State-specific guidance**
  - We'll make sure your will complies with your state's requirements

BACK

No Thanks

+ ADD

TAXSLAYER
FOUNDATION

Donate today!

The TaxSlayer Foundation supports charities that strengthen our community and provide others with an opportunity for success. These charities include SafeHomes Domestic Violence Center, the Jud C. Hickey Center for Alzheimer's Care, ForcesUnited, and the Apparo Academy.

$ 1 | $ 5 | $ 10 | $ 25

Other amount

BACK

No Thanks

DONATE

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Let's review your order summary

Please review and make any necessary adjustments.
Select continue once you're done reviewing

TAX PREP SUMMARY

TaxSlayer EFile Included with Package	FREE
AZ Return Included with Package	FREE

EXTRA SERVICES SUMMARY

- No additional products have been selected -

Browse Now

Subtotal: $0.00

Sales Tax: $0.00

Total: $0.00

Already have a promo code?

GUARANTEED MAXIMUM REFUND

Guaranteed Maximum Refund

We guarantee you will receive the maximum refund you are entitled or we will refund you the applicable TaxSlayer purchase price paid.

100% ACCURACY GUARANTEE

100% Accuracy Guarantee

We guarantee 100% accurate calculations or we will reimburse you any federal and/or state penalties and interest charges.

REFUND SUMMARY

Federal	$1,221
State - AZ	$841

GUARANTEED MAXIMUM REFUND

Enter your bank account information

Your name must be listed on the bank account in order to process the refund or amount due. If it is not listed your bank may reject your request.

Account Type *

- Checking
- Savings

Bank Name *

Routing Number *

Verify Routing Number *

Where is my routing number?

Account Number *

Verify Account Number *

Where is my account number?

Deposit Amount

$ 1221

$1,221.00 of $1,221.00

Please enter the amount that you would like to deposit into this account. (e.g. $1000)

BACK

CONTINUE

Federal	$1,221
State - AZ	$841

GUARANTEED MAXIMUM REFUND

Setup Direct Deposit

Add a bank account for your refund to be direct deposited.

Total funds available for deposit:	$1,221.00
Amount already designated:	$-1,221.00
Remaining amount for deposit:	$0.00

* State refunds that you selected to be direct deposited will be deposited into the **FIRST** account listed.

Arizona Refund of $841.00

Bank	Account Number	Deposit Amount	
XXXXXXXXX	XXXXXXXXX	XXXXXXXXX	

You have allocated the total available amount for deposit.

BACK

CONTINUE

Abigail, for IRS Acceptance, we need the Adjusted Gross Income (AGI) from your 2018 tax return.

Do you have access to your 2018 tax return?

If you choose this option, then the next screen will ask for you to input last year's AGI.

- ◯ **Yes,** I have my 2018 tax return with me.
- ◯ **No,** I cannot locate my 2018 tax return.
- ◯ **No,** I didn't file a 2018 tax return.

If you choose this option, then the next slide will create a 5 digit Pin number.

Where can I get last year's tax return?

BACK

CONTINUE

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Create your PIN.

That's okay! Create a 5-digit PIN for this year's tax return. Next year, we will automatically populate this for you.

Taxpayer's 5-digit PIN

BACK SUBMIT

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Review your information

We're almost ready to send your information to the IRS. Before we do, please take a quick look over the information below. Incorrect information will result in your refund being delayed.

Email Address

XXXXXXXXXXXX

Phone Number

XXXXXXXXXX

Mobile Phone Number

XXXXXXXXXX

Taxpayer Details

Abigail Adams
738-00-2019
8/2/1995

Edit Details

Entering the information here is considered the same as signing your tax return. By doing so, you are agreeing to the Consent to Disclosure statement below.

Consent to Disclosure
Under penalties of perjury, I declare that I have examined this return, including any accompanying statements and schedules and, to the best of my knowledge and belief, it is true, correct, and complete. I consent to allow my Intermediate Service Provider, transmitter, or Electronic Return Originator (ERO) to send my return to IRS and to receive the following information from IRS: a) an acknowledgement of receipt or reason for rejection of transmission; b) the reason for any delay in processing or refund; and, c) the date of any refund.

BACK

CONTINUE

Almost done!

The IRS requires us to verify you're a human, which helps keep your information and money safe and sound.

Enter the code shown above into the box below:

BACK

You are done!! → FILE MY RETURN!

What about if you change your mind?
The next few slides will help you with that.

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TaxSlayer

- My Account
- Basic Information
- Federal Section
- Health Insurance
- State Section
- Summary/Print
- E-file
- Mailbox
- Settings
- Save & Log Out

My Account

Click here 1st,
Then click here.

Current Year Tax Return

RETURN STATUS

Federal Return	Created	>	E-filed	>	Status
Arizona Return	Created	>	E-filed	>	Status

CONTINUE 2019 RETURN >

Prior Years

Manage Account

Account Info

Account Security

Transaction History

Banking Information hide

Bank Name	Account Number	Routing Number	Type
DSFCU	xxxxxx0980	xxxxx7238	Checking

PRINT

Select an option and click here.

IRS Payment Information hide

No information to display

Deactivate Tax Return hide

Tax Year 2019 (738-00-2019)

- ✓ - Please Select -
- Made mistakes, want to start over
- Chose wrong package
- Not using product, don't save my info

RT

* You will be logged out of your account after deactivating your return.

MY ACCOUNT

Banking Information hide

Bank Name	Account Number	Routing Number	Type
DSFCU	xxxxxx0980	xxxxx7238	Checking

PRINT

IRS Payment Information hide

No information to display

Deactivate Tax Return hide

Tax Year 2019 (738-00-2019)

Not using product, don't save my info

CLEAR YOUR RETURN AND RESTART

* You will be logged out of your account after deactivating your return.

MY ACCOUNT

TaxSlayer

- My Account
- Basic Information
- Federal Section
- Health Insurance
- State Section
- Summary/Print
- E-file
- Mailbox
- Settings
- Save & Log Out

click here.

My Account

Current Year Tax Return

RETURN STATUS

Federal Return	Created	E-filed	Status
Arizona Return	Created	E-filed	Status

CONTINUE 2019 RETURN

Prior Years

Manage Account

Account Info | Account Security | Transaction History

Your tax return filing will still be free but only if you've created an account and started your tax return at one of the City of Phoenix VITA sites. You can always come back to the VITA site if you have any questions prior to e-filing your tax return.

To learn if your refund has been processed:

24 hours after e-filing, go to **IRS.gov/refunds** or from your phone download **IRS2Go app**.

What you will need:

- Social security number or ITIN
- Your tax filing status
- The exact amount of your federal refund

To check the status of your State of Arizona refund, go to **aztaxes.gov.**

Any issues? Send an email to the TaxSlayer from their website:
TaxSlayer.com/SupportCenter/tax-help

FSA - 2021

Facilitated Self Assistance

(Do-It-Yourself Taxes)

Any Questions?

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REVIEW

- Must pass appropriate testing before volunteering at any VITA site

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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

To take the tests, click on exams

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Welcome Ann! | Logoff

VITA/TCE

IRS

2016 VITA/TCE Certification Test | My Account

Basic | Advanced

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 exam, 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
r Standards
course, click here
review the course in PDF format.

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

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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 begin the Volunteer Standards of Conduct (VSOC) exam.

Start Assessment

To start the exam, click here

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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

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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] take 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] quality service and accurate return preparation, every site i[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

Bac[illegible] | SUBMIT | [illegible]rst 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:

Click here to close exam screen

Questions	
1. When should an IRS-certified volunteer preparer participating in the VITA/TCE Programs perform a comple iew 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 oth 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

Link & Learn website will give your test score immediately!

Assessment Statistics

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

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REVIEW

All volunteers must complete

- Form 13615 Volunteer Agreement.
  - Must be signed and dated
  - Confirms tests passed and certification level
  - Must be signed by your site coordinator(s)

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Link & Learn Certification

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

Welcome Hong! | Logoff

VITA/TCE Central

IRS

2015 VITA/TCE Certification Test | My Account

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

1st, Please, click here

2nd, Please, click here

Course name			
2015 Volunteer Standards of Conduct - Exam	100.00 %	Pass Print Certificate	1
2015 Intake/Interview and Quality Review Exam	1	Pass	
2015 Site Coordinator Training	Complete	Print Certificate	
2015 Basic Exam			0
2015 Health Savings Accounts (HSA) Exam	93.33 %	Pass Print Certificate	1

☑ You may sign your Volunteer Agreement electronically by checking this box

Hong Picchione 11/14/2015

Click here to open and complete your Volunteer Agreement. Click Print from the file menu to print the page.

Save the Volunteer Agreement for your records.

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 Review training.

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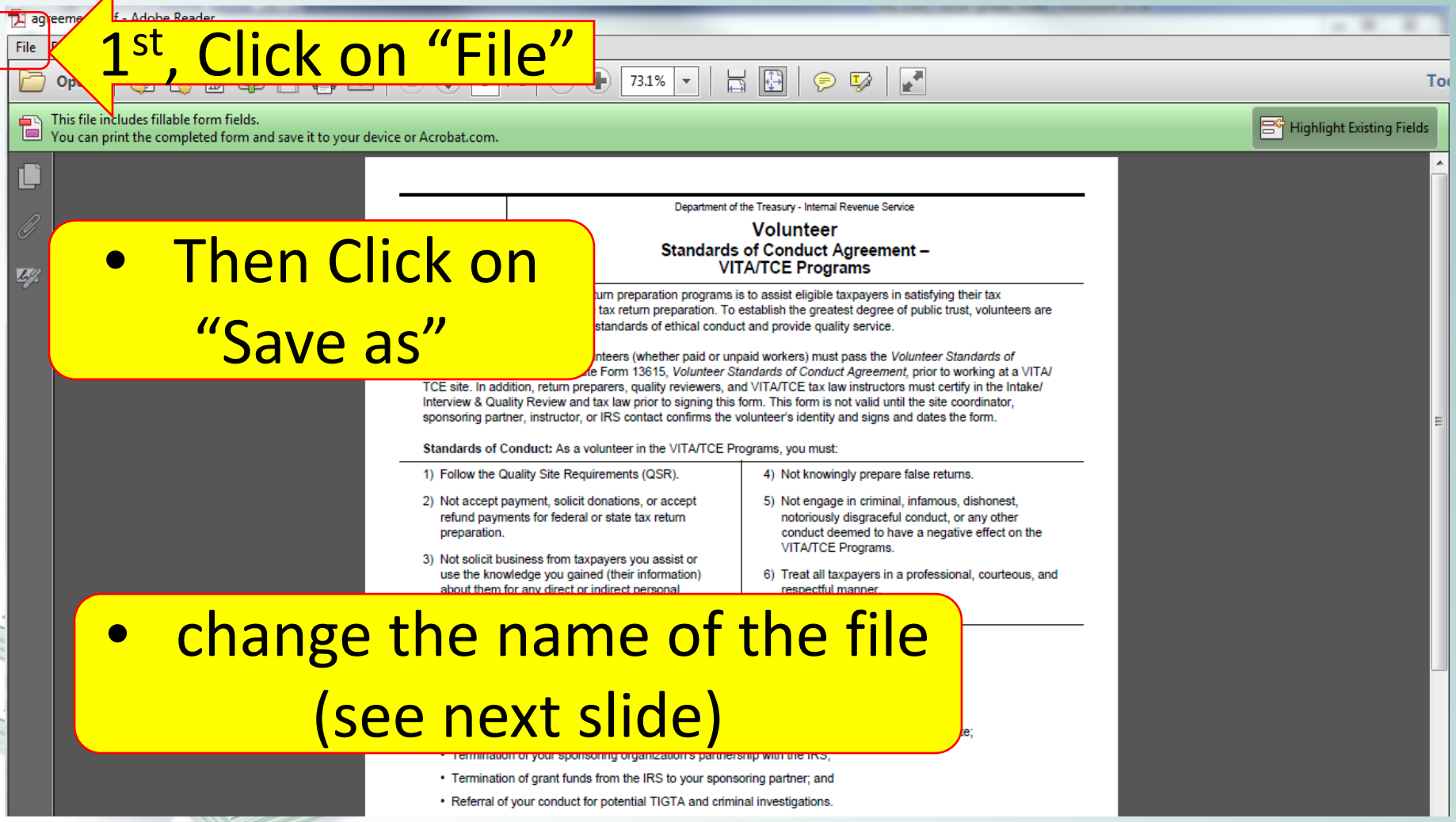
Link & Learn Certification

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

1st, Click on "File"

- Then Click on "Save as"

- change the name of the file (see next slide)



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Link & Learn Certification

If you do not change the file name, it will be saved as
"13615 agreement.pdf".
Instead **SAVE AS** and change the file to:
"*firstinitial lastname 13615 2021.pdf*".

At home, print one copy to give to your site coordinator and also email the file to "vita.taxhelp@phoenix.gov".

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Reference Tools & Resources-1

- Publication 4012
- Publication 4491
- Publication 17
- IRS.gov – Interactive Tax Assistance (ITA)

These should be referred to when needed as you prepare each tax return.

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Reference Tools & Resources-2

- Site Coordinator
- Volunteer Hotline: **1-800-829-8482 (1-800-TAX-VITA)** is for volunteers only
- "Phoenix.gov/eitc/vitavolunteerresources"

These should be referred to when needed as you prepare each tax return.

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

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Tax Year 2021
TAX LAW
PROGRAM TRAINING
Session 6

City of Phoenix VITA Network 2021