

Table of Contents – Tax-Aide: Training and Tax Law Library

A. Training Resources

A.1. All-In-One Lessons

A.1.1. All-In-One Lessons TY19

A.1.1.1. ~READ ME All-In-One Interactive Exercises TY2019

A.1.1.2. Exploring Education Benefits TY2019

A.1.1.3. Exploring Filing Status TY2019

A.1.1.4. Exploring Form 1099-R TY2019

A.1.1.5. Exploring Investment Income 2019

A.1.2. All-In-One Lessons TY20

A.2. Continuing Education Credits

A.2.1. FACT Sheet Continuing Education Credits - 2019 Filing Season

A.2.2. SPEC Territory Manager Listing - October 2019

A.3. Online Training

A.3.1. Online Training and Videos

A.3.2. Online Training and Videos Rollout

A.3.3. New Tax Law Knowledge Checks

A.4. Presentations

A.4.1. Adult Learning and Effective Instructions

A.4.1.1. Effective Adult Learning and Instruction (TY19).pptx

A.4.2. Cancellation of Debt (COD) - Principal Residence

A.4.3. Introduction to TaxSlayer TY19

A.4.4. Use of Electronic Documents to Prepare Tax Returns

A.5. Pub 4491 - NTTC Modified

A.5.1. NTTC 2019 Modifications to TY2018 Pub 4491 Rel 1

A.5.2. NTTC Modifications to TY2019 Pub 4491 Rel 1a

A.5.3. NTTC Modified TY2019 Pub 4491 Rel 1

A.6. Self-Study

A.6.1. Resources

A.6.2. Self-Study Comprehensive Lessons TY19 Rel 1

A.6.3. Self-Study Program TY19 Rel 1

A.7. Training Materials

A.7.1. Create name tents, name tags and Practice Lab instructions

A.7.2. Creating a PowerPoint Presentation

A.7.3. Gold Standards for Quality Review TY19

A.7.4. Instructions for Creating Individual Nametags etc

A.7.5. Instructor Aids - 15 Min Break

A.7.6. Instructor Aids - Names

A.7.7. Instructor Aids - Tags

A.7.8. Instructor Aids - Tent

A.7.9. Instructor Aids - Tent without logo

A.7.10. Modifying and Using NTTC Slides in PowerPoint

- A.7.11.** PowerPoint Presentation Guidelines
- A.7.12.** Questions and Comments for Discussion
- A.7.13.** Taking the test online 2019
- A.7.14.** TaxSlayer Practice Lab Instructions
- A.7.15.** Volunteer Mentors for Training
- A.8. Training Slides**
 - A.8.1.** 00 READ ME – NTTC Training Slides TY19 Rel 1a
 - A.8.2.** 00 READ ME – NTTC Training Slides TY19 Rel 2
 - A.8.3.** 01 Introduction to Tax Law TY19 Rel 2
 - A.8.4.** 02 Introduction to TaxSlayer TY19 Rel 1a
 - A.8.5.** 03 Course Introduction TY19 Rel 1a
 - A.8.6.** 04 Identity Theft TY19 Rel 1a
 - A.8.7.** 05 Screening and Interviewing TY19 Rel 1a
 - A.8.8.** 06 Quality Review TY19 Rel 1a
 - A.8.9.** 07 Filing Basics TY19 Rel 2
 - A.8.10.** 08 Filing Status TY19 Rel 2
 - A.8.11.** 09 Dependents TY19 Rel 2
 - A.8.12.** 10 Unique Filing Status TY19 Rel 1a
 - A.8.13.** 11 Income Wages TY19 Rel 1a
 - A.8.14.** 12 Income Interest and Dividends TY19 Rel 2
 - A.8.15.** 13 Income State Tax Refund TY19 Rel 1a
 - A.8.16.** 14 Income Alimony TY19 Rel 1a
 - A.8.17.** 15 Income Business TY19 Rel 1a
 - A.8.18.** 16 Income Capital Gains and Losses TY19 Rel 2
 - A.8.19.** 17 Sale of Real Estate TY19 Rel 2
 - A.8.20.** 18 Income Retirement TY19 Rel 2
 - A.8.21.** 19 Income Rent and Royalty TY19 Rel 1a
 - A.8.22.** 20 Income Schedule K-1 TY19 Rel 1a
 - A.8.23.** 21 Income Unemployment Compensation TY19 Rel 1a
 - A.8.24.** 22 Income Social Security TY19 Rel 1a
 - A.8.25.** 23 Income Other TY19 Rel 2
 - A.8.26.** 23a Cancellation of Debt (COD) - Principal Residence TY19 Rel 2
 - A.8.27.** 24 Income Other - Medicaid Waiver TY19 Rel 2
 - A.8.28.** 25 Income Form 1099-MISC TY19 Rel 1a
 - A.8.29.** 26 Adjustments to Income TY19 Rel 1a
 - A.8.30.** 27 Standard and QBI Deduction TY19 Rel 2
 - A.8.31.** 28 Itemized Deductions TY19 Rel 2
 - A.8.32.** 29 Child and Dependent Care Credit TY19 Rel 1a
 - A.8.33.** 30 Education Benefits TY19 Rel 2
 - A.8.34.** 31 Foreign Tax Credit TY19 Rel 1a
 - A.8.35.** 32 Child Tax Credit Other Dep Credit TY19 Rel 1a
 - A.8.36.** 33 Miscellaneous Credits TY19 Rel 2
 - A.8.37.** 34 Other Taxes TY19 Rel 2
 - A.8.38.** 35 Payments TY19 Rel 1a

- A.8.39.** 36 Earned Income Credit TY19 Rel 1a
- A.8.40.** 37 Finishing the Return TY19 Rel 1a
- A.8.41.** 38 Affordable Care Act TY19 Rel 2
- A.8.42.** 39 Final Steps TY19 Rel 1a
- A.8.43.** 40 Amended and Prior Year Returns TY19 Rel 1a
- A.8.44.** 41 IRS Issued Identification Numbers TY19 Rel 1a
- A.8.45.** 42 Tax Law Changes TY19 Rel 3a
- A.8.46.** 43 Qualifying Child Charts TY19 Rel 1a
- A.8.47.** NTTC TY2019 Training Slides Rel 2 01-07
- A.8.48.** NTTC TY2019 Training Slides Rel 2 08-15
- A.8.49.** NTTC TY2019 Training Slides Rel 2 16-32
- A.8.50.** NTTC TY2019 Training Slides Rel 2 33-42,44
- A.8.51.** NTTC TY2019 Training Slides Rel 1a 43
- A.8.52.** NTTC TY2019 Training Slides Rel 2 Only

A.9. TRS Webinars

A.9.1. August 12/14 2020 TRS

- A.9.1.1.** 01 2020-08-12 Intro to Webinars
- A.9.1.2.** 02 2020-08-12 Resources-Tools as Workshop Suggestion
- A.9.1.3.** 03 2020-08-12 Online Training
- A.9.1.4.** 04 2020-08-12 Documents and Links v4
- A.9.1.5.** 05 2020-08-12 Questions and Suggestions v4
- A.9.1.6.** 06 2020-08-12 Wrap-Up

A.9.2. August 26/28 2020 TRS

- A.9.2.1.** 01 Recording Links
- A.9.2.2.** 02 Tax Law Changes v6
- A.9.2.3.** 03 NTTC Workbook-Instructor Guide
- A.9.2.4.** 04 Online Training Update 2020-08-26

A.10. Workbook

- A.10.1.** NTTC Workbook TY2020 e-version

A.11. NTTC Training Guide 2020-2021

B. Tax Return Reference Materials

B.1. Pub 4012- NTTC Modified

B.1.1. NTTC MODIFIED Pub 4012 Prior Year

- B.1.1.1.** NTTC Modified Pub 4012 Rel 2 TY18
- B.1.1.2.** NTTC Modified Pub 4012 TY17
- B.1.1.3.** Using NTTC Modified Pub 4012 TY18 e-version
- B.1.1.4.** Using NTTC Modified Pub 4012 TY18 e-version

B.1.2. NTTC MODIFIED Pub 4012 TY19

B.1.2.1. Print View NTTC Modified 4012

- B.1.2.1.1.** 1 Full 1-Sided Print Insert NTTC Modified Pub4012 Rel 1 TY19
- B.1.2.1.2.** 2 Full 2-Sided Print Insert NTTC Modified Pub4012 Rel 1 TY19
- B.1.2.1.3.** 3 Essential 1-Sided Print Insert NTTC Modified Pub4012 Rel 1 TY19

C.4.11. Tax-Aide Off Season Tax Assistance

D. State Tax Assistance Program

- D.1. Intake Sheets- STAP**
- D.2. STAP Participating States TY19**
- D.3. STAP Security Template**
- D.4. State Tax Assistance Program - Assisting Steps TY19**
- D.5. State Tax Assistance Program - Requesting Steps TY19**
- D.6. State Tax Assistance Program Webinar TY19**
- D.7. State Tax Assistance Program Webinar TY19 Notes**
- D.8. Using Google Meet - STAP**

Table of Contents – Tax-Aide: Training and Tax Law Library
Training and Tax Law Library Change Log v1