

# OneSupport Help Center

## Tax Training



The AARP Volunteer Portal is an easy to use website that provides tools, information and resources for AARP and AARP Foundation Volunteers.

Supported browsers: Internet Explorer 9 and 10.  
IE11, FireFox, Chrome and Safari are not guaranteed to work consistently.



## Login to Portal

Email:

Password:

LOGIN

[Forgot Password? Click Here](#)

[New User? Register Here](#)

# Portal Choices



Volunteer Portal

Logged in as: Robert Eslinger | [Update Profile](#) | [Logout](#) A A A



## My Preferences

- ▶ OneSupport Help Center
- + Sites
- + Program Material
- + Volunteer Records
- + Volunteer ShareNet



## Welcome to the Tax-Aide Program

Welcome to the Volunteer Engagement Portal. The AARP Tax-Aide Home Page is a one-stop webpage that can be used to gain access to the program's handbooks, guides, information, along with resources for electronic filing (e-filing).

Please access the site regularly to experience the new content and features that we will continue to add.

Thank you for your service to the AARP Tax-Aide Program.

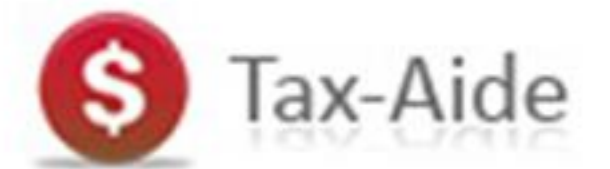


# Volunteer ShareNet Closed



Volunteer Portal

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## My Preferences

- ▶ OneSupport Help Center
- + Sites
- + Program Material
- + Volunteer Records
- **Volunteer ShareNet**
- ▶ Hot Topics

## Hot Topics

### The Volunteer ShareNet is closed as of 11-03-2014....

The Volunteer ShareNet is closed as of 11-03-2014. Please use the "OneSupport Help Center" link located under "My Preferences".

*Date: Nov 03, 2014*

[READ FULL ARTICLE >>](#)

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# Portal Choices



Volunteer Portal

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## My Preferences

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## ONESUPPORT HELP CENTER

Communication

General Program Management

Leadership Training

Portal and VMIS Support

Tax Training

TaxWise

Technology

### Hot Topics

??? Have a Question ??? - Contact Us here

AARP Foundation Tax Aide Fellows Recipients 10/30/14

[Accessing Link & Learn Tests TY14 11/17/2014](#)

Content Owners Admin Guide - Rev 11/19/14

Dealing with large or bloated pdf files created from Office apps. 11/10/14

How to Follow a Section (Subcategory) REV 112014

OneSupport Help Center Quick Guide Rev 11/12/2014

Site Map

Video Introduction to OneSupport Help Center

# TAX TRAINING

## Tax Law (8)

- README - NTTC Training Files TY14 Rel 1
- NTTC Training Files - Lessons 01-14 TY14 Rel 1 (zip)  
10/30/2014
- NTTC Training Files - Lessons 15-30 TY14 Rel 1a (zip)  
11/5/2014

## Training Plans (9)

- ★ Accessing Link & Learn Tests TY14 11/17/2014
- Training Guide TY14
- Gold Standards for Quality Review (QR)

## Training Tools (15)

- Topics Matrix – NTTC Practice Problems TY14 11/18/14
- Locally Developed Tools Guide TY14
- Classroom Exercises Training TY14 v3 (zip) 11/12/14

## Affordable Care Act (ACA) Training (6)

- ACA Review Presentations v6 11/30/14
- Affordable Care Act ACA Laminate Guide TY14
- ACA Addenda to Practice Problems V2 TY14 11/17/14

## NTTC Webinars (4)

- TWO Immersion Webinar v1 11-21-14
- TRS Webinar August TY14 (zip)
- TRS Webinar ACA September TY14 - Powerpoint

## TWO Immersion Training (3)

- TWO Template Set Up Instructions v2 11/21/14
- Creating and Using Training Template in TaxWise Online  
10/8/14
- TWO Immersion Lesson Guide Training TY14 100814 (zip)

## How To Follow A Section (Subcategory) REV 112014

Download:

HowToFollowASubcategoryGuide112014.pdf (300 KB)

OneSupport Help Center (OSHC) offers a feature called "Follow." The Follow feature provides real time email notification when a new article is created or updated within a specific section (subcategory). You may choose to follow as many sections (subcategories) as you choose. As the content owner, if you are following the section (subcategory) you are updating, you will not be notified via e-mail. To Follow:

1. Navigate to a section (subcategory) of interest.
2. Click on the **Follow** button next to the section (subcategory) and select "New Articles".  
NOTE: The comment option is not available at this time, so please do not select "New Article And Comments."

## Affordable Care Act (ACA) Training

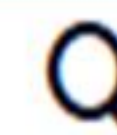
Follow ▼

- Affordable Care Act ACA Laminate Guide TY14
- ACA Addenda to Practice Problems V2 TY14 11/17/14
- Practice Problems ACA Addenda 11/15/14 (zip)
- Practice Problems ACA Addenda - Answers 11/15/14 (zip)
- TaxWise and ACA v2 11/15/14

New Articles

New Articles And Comments





## Tax Law

Follow ▾

- README - NTTC Training Files TY14 Rel 1
- NTTC Training Files - Lessons 01-14 TY14 Rel 1 (zip) 10/30/2014
- NTTC Training Files - Lessons 15-30 TY14 Rel 1a (zip) 11/5/2014
- NTTC Training Files - Lessons 31-45 TY14 Rel 1 (zip) 10/30/2014
- Tax-Aide Scope Manual V1 TY14
- Scope Change Request Guide & Form
- Use of electronic documents to prepare tax returns

New Articles

New Articles And Comments

# Training Plans

- ★ Accessing Link & Learn Tests TY14 11/17/2014
- Training Guide TY14
- Gold Standards for Quality Review (QR)
- Client Facilitator TY 2013v1010814-1
- 1098-T Requirements TY14
- Practice Lab IRS Fact Sheet TY14
- 2015 Filing Season: Link & Learn Taxes Certification Report IRS Fact Sheet
- TY14 IRS Training Materials and Forms
- Prior Year Amended Returns for Same-Sex Couples TY14

Practice Problems including ACA information to be added. Line by line answers to be sent to all TRSs.

## Training Tools

→ Topics Matrix – NTTC Practice Problems TY14 11/18/14

To be moved to Training Plans

- Locally Developed Tools Guide TY14
- Classroom Exercises Training TY14 v3 (zip) 11/12/14

→ Forms Generator v7.3.0.4 TY13-TY15 (zip) 11/16/14

- Instructor Aides Guide TY14 (zip)

→ Practice Problems TY14 Ver1 110414 (zip)

To be deleted and replaced with updated problems including ACA addenda

→ Qualifying Child or Relative Charts 092514 Training TY 14

→ Corrections to TY13 Qualifying Child or Relative Charts - July 30, 2014

- Pub 4491-W Withholding Guide TY13 12/11/2013
- Unofficial Pub 4491 Line by Line Answers TY13 12/11/2013
- Unofficial Pub 4491 W Errata Guide TY13 12/11/2013
- Specialty Presentations Training TY14 (zip)
- Tax Prep Aides Training TY14 (zip)
- Potential Identity Theft Letter 11/26/14
- Using OpenOffice with NTTC PowerPoint Slides TY13

## NTTC Training Exercises – Tax-Aide – TY2014

1040 2014 Line #	Subject	Hudson	Cunningham	Clark	Scott	Meadows	Wilson	Moore	Holmes
1-5	Filing status	S	MFS	MFJ	MFJ	MFJ	HOH	QW	MFJ
6	Dependents-children		X	X	X	X	X	X	
6	Dependents-other				X		X		X
7	W-2	X	X	X	X	X	X	X	
8	Interest	X	X	X	X	X	X	X	X
9	Dividends			X	X	X	X		X
12	Small business (Sch C)				X				X
13	Capital gain			X	X	X			X
15	IRA Distribution					X	X		X
16	Pension Distribution				X	X	X	X	X
19	Unemployment compensation			X					
20	Social Security benefits								X
21	Other income		X		X			X	X
27	Deductible part of SE tax				X				X
30	Penalty on early withdrawal				X	X			
31a	Alimony paid					X			
32	IRA deduction	X							
33	Student loan interest deduction	X				X		X	
40	Itemized deductions						X		X
47	Foreign tax credit					X	X		X
48	Child & dependent care credit				X				
49	Education credit				X		X	X	
50	Retirement savings credit				X				
51	Child tax credit			X	X	X	X	X	X
56	Self-employment tax				X				X
59b	FTHB repayment						X		
64a	EIC				X	X			
65	Additional child tax credit				X	X	X		
66	Refundable education credit				X		X	X	
73-75	Direct deposit/debit/savings bond	X		X	X		X		

## NTTC Training Exercises – Tax-Aide – TY2014

1040 2014 Line #	Subject	Hudson	Cunningham	Clark	Scott	Meadows	Wilson	Moore	Holmes
1-5	Filing status	S	MFS	MFJ	MFJ	MFJ	HOH	QW	MFJ
<b>Affordable Care Act Addenda</b>									
46	Excess premium tax credit	X							
61	Full year coverage	X	X		X	X	X	X	X
61	Individual responsibility paymt			X					
69	Net premium tax credit					X			



## Affordable Care Act (ACA) Training

Unfollow

- ACA Review Presentations v6 11/30/14
- Affordable Care Act ACA Laminate Guide TY14
- ACA Addenda to Practice Problems V2 TY14 11/17/14
- Practice Problems ACA Addenda Rev 11/25/14 (zip)
- Practice Problems ACA Addenda - Answers 11/15/14 (zip)
- TaxWise and ACA v2 11/15/14

To be deleted. Addenda information included in new Practice Problem release

## ACA Review Presentations V6 12/3/14

Download:

ACA Overview v6 113014.zip (5 MB)

Presentations on the details and TaxWise implementation of the Affordable Care Act.

The .zip file above contains two PowerPoint files - ACA Overview Part I and ACA Overview Part II. Both files can also be downloaded separately below – the Part I file and/or and the Part II file that is split into two sections for ease of downloading - download and combine both Part IIA and Part IIB to have the entire Part II presentation.

### ACA Overview Part I

PowerPoint [Download](#)  
[Thumbnails](#)

### ACA Overview Part IIA

PowerPoint [Download](#)  
[Thumbnails](#)

### ACA Overview Part IIB


PowerPoint [Download](#)  
[Thumbnails](#)

## NTTC Webinars

- TWO Immersion Webinar v1 11-21-14
- TRS Webinar August TY14 (zip)
- TRS Webinar ACA September TY14 - Powerpoint
- TRS Webinar Immersion October 2014 (zip)



## TWO Immersion Training

- TWO Template Set Up Instructions v2 11/21/14
- Creating and Using Training Template in TaxWise Online 10/8/14
- TWO Immersion Lesson Guide Training TY14 100814 (zip) 

To be replaced with Series I and Series II

# Series I Immersion Training

- **Basically an update to what is currently posted. Fully compatible with the earlier version**
- **Six templates sent with NTC Master Template support Series I**
  - **Email (Guide to using the NTTC TRNG templates 12/1/14) has been sent to all TRSs and will be included in [Training Plans]**
- **Start with the Read-me file**

# Series II Immersion Training

- **Utilizes existing training exercises from Pub 4491-W (2013 edition with pen & ink changes as needed)**
- **21 Detailed lessons with six day schedule (includes handouts)**
- **Detailed directions to create six different templates (no additional templates are required)**
- **Start with the Read-me file**

# Good News!

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- **Access now available for trainees to OSHC [Tax Training]**
- **Email: [taxaidetrainee@gmail.com](mailto:taxaidetrainee@gmail.com)**
- **Password: welcome1**

# Locally Developed Tool Guide

## Classroom Exercises (Classroom Exercise Training TY14.zip)

Filing Status and Dependency Exercises (folder)	Several different exercises with scenarios for classroom discussion – about six questions per exercise
Interview Exercise – Jane Myers (folder)	Powerpoints and handouts for role-play interview exercise to determine filing status and dependent categories
Lesson – Pensioner Jones (folder)	Instructor notes and handouts of completed interview form and tax forms for classroom exercise preparing a pensioner Jones’s tax return [FL2 Bobbie Seabolt]
Quality Review Exercise – Evans (folder)	Handouts for breakout exercise doing quality review of Evans’ return
Quizzes (folder)	17 quizzes to give during training
Donald Duck 2013.pdf	Tax forms and notes for a comprehensive problem that students can work on piece by piece as they are introduced to various topics. [TX2—Ernest Chase]

## Forms Generator.zip

Setup file for a program that lets you create tax forms for any practice problems you want to create. Be sure to read included User's Guide. [WA1 Frank Hill]

# Locally Developed Tool Guide

## Non-training Info for Instructors (Instructor Aides Guide TY14.zip)

Create name tents, tags and TWO logins (folder)	An Excel spreadsheet and three mailmerge documents to create individual name tents, name tags and TWO log on instructions for each student.
15 min break.ppt	Powerpoint that counts down a 15-minute break
Creating a PowerPoint Presentation.ppt	27-slides showing step-by-step instructions for creating a PowerPoint presentation
Instructor Guidance from FL1 D13.doc	Six pages of general advice to instructors [Mike McHugh]
Instructor Guidance from MN1.pdf	Ten pages of advice and checklists for instructors [Ella Vanlaningham]
Instructor Guidance from VA1 D3.pdf	One page of thoughts to guide lesson planning [Les Jones]
Modifying and Using NTTC Slides in PowerPoint.pdf	How to modify NTTC Slides. For Office 2010 only, how to display instructor notes while projecting only the slide
Modifying the NTTC Slides in OpenOffice.pdf	How to modify NTTC Slides using OpenOffice Impress
PowerPoint Presentation Guidelines.ppt	35-slides with guidelines for making your PowerPoint presentation better

### Practice Problems TY14.zip

Practice problems to supplement Pub 4491-W.

### Qualifying Child or Relative Charts 8-5-14 Training TY14.pdf

Laminated Tri-fold from Fall 2013 updated to include corrections and some reformatting are in ShareNet>TaxLaw Training>Tax Law

# Locally Developed Tool Guide

Filename	Description
Qualifying Child or Relative Charts Corrections 8-5-14	Corrections that can be cut out with scissors and taped to laminated tri-fold are in ShareNet>TaxLaw Training>Tax Law
<b>Specialty Presentations (Specialty Presentations Training TY14.zip)</b>	
1099-Misc Box 7 and Line 21.pdf	IRS explanation of when to use Schedule C and when to use Line 21. This explanation relates to payments for family care, but the concept is also useful for explaining incidental or hobby income.
Form 5329 (Waiver of Early Withdrawal Penalty) example.ppt or .pdf	Powerpoint or handout of example of early distribution penalty and how it can be waived, with screen shot [AK1—Betsy Robertson]
Kate and her Kid – Advanced Interview Example.pdf	Real-life situation (now training exercise) showing importance of probing questions during the interview [AK1—Betsy Robertson]
02 Introduction to TWO.ppt	40-slide Powerpoint showing how to log on and move around in TWO is located in ShareNet>Tax Training>Tax Law>Tax Law Training Lessons
Take the Test Using Link & Learn.pdf	Instructions for logging in and taking the certification test using Link & Learn [FL2 – Bobbie Seabolt]

# Locally Developed Tool Guide

## Tax Prep Aids (Tax Prep Aides Training TY14.zip)

2014 EIC.pdf	Graph showing EIC amounts vs income
ACA Laminate.pdf	Printable copy of Flowchart to follow for Affordable Care Act tax provisions
Dependency Qualification Calculator.pdf	Link to a web-based comprehensive calculator to determine for which tax benefits a child or other person qualifies the taxpayer [CO1—Jeff Bogart]
Health Savings Accounts.pdf	Simple instructions if taxpayer has W in Box 12 of W-2
Identity Theft revised 10-2013.pdf	Identity Theft Info: discussion, forms, instructions, IRS guidance and sample letter to send when a return rejects as already filed
Real Estate Tax Flowchart.pdf	Flowchart to determine which real estate taxes are deductible
Simplified Method Calculator for Excel.xls	Excel spreadsheet that prints a one-time display of TaxWise entries and allowable exclusion for all future years. [NC1—Kenny Hayes]
Simplified Method Calculator for Libre & OpenOffice.odt	Spreadsheet for OpenOffice or OfficeLibre that prints a one-time display of TaxWise entries and allowable exclusion for all future years. [NC1 – Kenny Hayes]
Simplified Method Web-based Calculator.pdf	Link to a webpage that prints a one-time display of TaxWise entries and allowable exclusion for all future years. [CO1—Jeff Bogart]
Travel Expenses.pdf	Determining tax home, what expenses are deductible, and where they go on the tax return
Weblinks.pdf	URLs for useful websites, some for training, some for tax prep



# OneSupport Help Center Tax Training



**QUESTIONS????**  
**Suggestions????**