

NTTC Training Videos Release 3

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** New in Nov 3 release

&& New in Nov 14 release

Training Videos

	Video Link	Description	Audience	Time (min.)	PowerPoint Only Link
Tax Law & Preparation					
Tax Law 2022					
	Tax Law 2022 changes **from TRS Webinar, 10/19/22	Explains law and scope changes current as of 10/14/22. Question and answer session included.	Counselors	59	Tax Law changes PPT from TRS Webinar, 10/19/22
	Tax Law Highlights 2022**	Highlights of existing and new tax law 2022	Counselors	10	Tax Law Highlights 2022
	Baker example**	Understanding the differences in a working parent's refund between 2022 and 2021	Counselors	5	Baker example PowerPoint Baker example spreadsheet
	Kaczinski example**	Understanding why a senior taxpayer's refund may be lower in 2022	Counselors	3	Kaczinski example PowerPoint Kaczinski example spreadsheet

	Video Link	Description	Audience	Time (min.)	PowerPoint Only Link
Basic Information					
	Welcome	Welcome to new volunteers	All	7	Welcome
	Intro to Federal Income Tax Law	Covers 1040 & schedules	Counselors	8	Intro to Federal Income Tax Law
	Intake Screening	Situations you may encounter during the intake	All	6	Intake Screening
	Filing Requirements	Who Must/Should File?	All	6	Filing Requirements
	Filing Status Basic	Intro to Filing Status	Counselors	13	Filing Status Basic
	Taxpayer Forms Income	Sorting through forms and info taxpayer brings	All	11	Taxpayer Forms Income
	Taxpayer Expense Forms	Sorting through expense forms the taxpayer brings	All	8	Taxpayer Forms Expense
	Overview of Schedules ABCD	A basic overview of the most common schedules we encounter	Counselors	10	Overview of Schedules ABCD
	Alvarado Nogales Basic Info	Example of workbook exercise & data entry	Counselors	13	Alvarado Nogales Basic Info
	Alvarado Nogales Income & Expense	Example of workbook exercise & data entry	Counselors	13	Alvarado Nogales Income and Expense
	Alvarado Nogales Finishing the Return	Example of workbook exercise & data entry	Counselors	10	Alvarado Nogales Finishing the Return

	Video Link	Description	Audience	Time (min.)	PowerPoint Only Link
Income					
	Wages	Entry of basic W-2	Counselors	7	Wages
	SSA-1099	Entry of basic SSA-1099	Counselors	9	SSA-1099
	1099-R Overview Basic	Introduces 1099-R forms and entry in TaxSlayer	Counselors	11	1099-R Overview Basic
	1099-R Public Safety Officer	Explains retired PSO health insurance premium exclusion and demos in TaxSlayer	Experienced Counselors	9	1099-R Public Safety Officer
	1099-R Qualified Charitable Distributions	Explains qualified charitable distributions and demos in TaxSlayer	Experienced Counselors	11	1099-R QCDs
	1099-R Rollovers	Explains retirement account rollovers and demos in TaxSlayer	Experienced Counselors	12	1099-R Rollovers
	1099-R Early Distributions	Explains early distributions from retirement accounts, reviews penalty exceptions and demos in TaxSlayer	Experienced Counselors	14	1099-R Early Distributions
	1099-R Disability	Handling a pension with disability	Experienced Counselors	9	1099-R Disability

	Video Link	Description	Audience	Time (min.)	PowerPoint Only Link
	1099-R Pension Exclusion	Handling pension exclusions using simplified method	Counselors	16	1099-R Pension Exclusion
	1099-R Distributions with Basis**	Handling IRA distributions when the taxpayer has a basis in the IRA	Experienced Counselors	13	1099-R Distributions with Basis
	Railroad Retirement Benefits	Railroad retirement pension plans, green and blue forms	Experienced Counselors	10	Railroad Retirement Fact Pattern Railroad Retirement
	Medicaid Waiver on W2	Medicaid Waiver payments paid on a W2	Experienced Counselors	17	MWP Paid on W2
	Scholarship Income	Treatment of Scholarships and Grants	Experienced Counselors	8	Scholarship Income
	Interest and Dividends	From Evans-Bryant workbook exercise	Counselors	4	
	Other Income	From Evans-Bryant workbook exercise	Counselors	7	Other Income
Adjustments/Credits					
	Adjustments	From Evans-Bryant workbook exercise	Counselors	6	
	Lump Sum Social Security Payment	Explains how to handle a lump sum SS payment	Experienced Counselors	9	Lump Sum Social Security

	Video Link	Description	Audience	Time (min.)	PowerPoint Only Link
	Education Credits	Overview of Education credits and TaxSlayer entry	Counselors	11	Education credits
	Child & Dependent care credit	From Evans-Bryant workbook exercise	Counselors	9	Child & Dependent Care credit
Health Savings Account (HSA)					
	HSA Contributions	Health Savings Account Contributions: Full Year; required for Test	Counselors	13	HSA Contributions
	HSA Distributions	Health Savings Account Distributions; required for Test	Counselors	15	HSA Distributions
	HSA Married	Health Savings Account Contributions: Married; Comprehensive topic	Experienced Counselors	15	HSA Married
	HSA Part Year	Health Savings Account Contributions: Part Year; Comprehensive topic	Experienced Counselors	15	HSA Part Year

	Video Link	Description	Audience	Time (min.)	PowerPoint Only Link
Advanced Topics					
	Bogart Education Calculator	Determine and optimize education credits	Experienced Counselors	14	Bogart Education Calculator
	Schedule A	Description of frequently seen itemized deductions and entry in TaxSlayer	Counselors	17	Schedule A
	Marketplace Insurance	Description of Marketplace Insurance and entering form 1095-A in TaxSlayer	Counselors	12	Market Place Insurance
	Filing Status Advanced	Covers advanced topics in filing status	Counselors	13	Filing Status Advanced
	Amended Returns Part 1	Amendments for tax returns that were done at your site	Experienced Counselors	20	Amended Returns Part 1
	Amended Returns Part 2	Amendments for tax returns when return is not available in TaxSlayer	Experienced Counselors	14	Amended Returns Part 2
	State Tax Refund	When is a state refund taxable?	Counselors	14	State Tax Refund
	Deceased Taxpayer	Explains how to handle deceased taxpayer in TaxSlayer	Counselors	14	Deceased Taxpayer

	Video Link	Description	Audience	Time (min.)	PowerPoint Only Link
	Sale of Residence Part 1	Basics of handling taxpayer's sale of residence	Experienced Counselors	8	Sale of Residence Part 1
	Sale of Residence Part 2	Comprehensive, less common topics with sale of residence	Experienced Counselors	9	Sale of Residence Part 2
	Schedule A with Health Insurance	From Evans Bryant workbook exercise	Counselors	13	Schedule A with Health Insurance
	Schedule C with Health Insurance	From Evans Bryant workbook exercise	Counselors	9	Schedule C with Health Insurance
	Schedule D brokerage statement &&	Entering brokerage statements	Counselors	11	Schedule D brokerage statement &&
	Schedule D Carryforward and Inherited Stock	From Evans Bryant workbook exercise	Counselors	6	Schedule D Carryforward and Inherited Stock
	Schedule E Rental Income	From Evans Bryant workbook exercise	Counselors	5	Schedule E Rental Income
Taxpayer Interaction					
	New Taxpayer Interview	Vignette of interview with Tom Andrews from Workbook	All	13	New Taxpayer Interview
	Out of Scope	Vignette of Counselor and Taxpayer whose return is out of scope	All	4	
	Missing Documents	Vignette of Counselor and Taxpayer who is missing documents	All	6	

	Video Link	Description	Audience	Time (min.)	PowerPoint Only Link
Instructor Resources					
Train the Trainer					
	Attitudes About Virtual Teaching	Make the change from Classroom to Virtual Training	Instructors	9	
	Management and Setup	Management and Setup	Instructors	11	
	Participation and Socializing	Getting students to participate and socialize virtually	Instructors	6	
	Adult Learning Principles	General Training Principles	Instructors	9	
	5 Step Model for Training Sessions	How to structure a training session for effective learning	Instructors	8	
	All-in-One Exercise Demo	Recorded session. How and why you can use All-In-One Exercises in class	Instructors	11	All-in-One Exercises
Google Meet					
	Using Google Meet	How to presentation	Instructors	12	Using Google Meet Using Google Meet Checklist

	Video Link	Description	Audience	Time (min.)	PowerPoint Only Link
	Google Meet Setup	How to set up Google Meet and advantages of using your Foundation account	Instructors	8	
	Google Meet Breakout Rooms	How to set up and use breakout rooms	Instructors	8	
	Google Meet Phone Options	How to call in to a meeting, use Google Meet to place a call, and invite someone to call into the meeting	Instructors and Students	5	
	Google Meet Participation Tools	How to use various features in Google Meet to enhance participation	Instructors	6	
	Google Meet Communicating with the Deaf	Introduction to Video Relay Service for the Deaf	Instructors	2	
Premium Google Meet					
	Premium Google Meet and Calendar**	Setting up premium google meet using the calendar and hosting a meet in the premium account.	Instructors and above with access to Premium Google Meet	22	Premium Google Meet and Calendar

	Video Link	Description	Audience	Time (min.)	PowerPoint Only Link
Google Forms	Note: View google forms videos in order because they build upon one another				
	Google Forms Basics	Creating google forms		11	
	Google Forms Types of Questions	Types of questions you can use in google forms	Instructors	8	
	Google Forms Quizzes	Creating a quiz in google forms	Instructors	13	
	Google Forms Multiple Choice Grid	Creating multiple choice grids in google forms	Instructors	21	
	Google Forms Checkbox Grid	Creating checkbox grids in google forms	Instructors	9	Checkbox Grid
	Google Forms Sections and Conditional Logic	Splitting forms into sections and using conditional logic	Instructors	16	
	Google Forms Appearance	Enhancing the appearance of google forms	Instructors	3	
	Google Forms Making a Copy	Making a copy of a google form	Instructors	6	Making a Copy
	Google Forms Copy Collaborate Attachment	Describes these three features of google forms	Instructors	9	
	Google Forms Header Size	Changing the header image size	Instructors	13	
	Google Forms Choice Limit	Describes an add-on feature that limits the number of responses to a question	Instructors	7	

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Enrichment Webinars					
	Google Forms **	Webinar explaining how to create google forms and other basic information. Audience participation with questions and answers.	Instructors	59	Steps to create a google form-document
	Google Misc. **	Webinar about google products: meet, drive, calendar, etc. Includes new information, question and answer session, and demonstrations.	Instructors	1:32	PowerPoint used in Google Misc. webinar
	Lesson Planning **	Webinar offering ideas on lesson planning with interaction from audience.	Instructors	1:02	Lesson planning PPT && Lesson planning template &&
	Brokerage Statements &&	How to read brokerage statements	Instructors Counselors	1:04	Brokerage Statements PPT && Brokerage Statements Resources &&
	Pub 4012 &&	Using electronic TY2022 NTTC Modified Pub 4012	Instructors Counselors	55	

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