

AARP Foundation Tax-Aide Program Tax Training PowerPoint Slides Release 1a: Tax Year 2019

The National Tax Training Committee PowerPoint training slides continue to include the in-scope tax law and associated TaxSlayer related information of the past few years. Content for many lessons is separated into Core and Comprehensive categories in an effort to separate the tax law and TaxSlayer information every volunteer must know to pass the Advanced test and serve the typical Tax-Aide taxpayer from other, typically more advanced topics. This is a judgment call as taxpayers and volunteers are not the same across every site.

Instructors should add Comprehensive tax law topics to the Core material to meet their situation. Comprehensive material is located in a separate section at the end of each slide deck. If an entire lesson is considered Comprehensive, it is indicated in the title slide notes section.

This release includes updated IRS forms screen shots where available and TaxSlayer screen shots based on Practice Lab 2018. It differs from Release 1 only to correct corrupted Notes Pages.

Slide Organization

The slides follow *Pub 4491* which is organized in roughly 1040 order. They provide the instructor a starting point for classroom discussion including the use of *Pub 4012*, *Volunteer Resource Guide* and *Pub 17, Your Federal Income Tax* that Counselors will use as reference materials onsite when preparing tax returns. The emphasis is on *Pub 4012* as the first source of detailed tax law for onsite use by Counselors as it is intended to cover the issues we see in the vast majority of tax returns we prepare.

Pub 17 is also an important onsite resource. References to *Pub 17* in the slides are to the 2018 version as the 2019 version is not yet available.

Using the PowerPoint Training Slides

- Instructors will need to hide, delete, add or change slides (see Attachment 1) to fit individual teaching styles, individual audiences, core versus comprehensive materials and available training time or to include local/state tax information.
- Encourage students to use the reference materials and look up the points Instructors want to emphasize (the rest of the points remain as a visual reminder).
- Instructors should choose problems from the NTTC *Workbook* to teach how to correctly enter tax items in the TaxSlayer return. The printed version of the workbook is available to order from the Volunteer Portal using the “Orders” tab. The electronic version is in the Portal Libraries.

- Tax-Aide policy requires practice exercises be completed by all volunteers and reviewed by Instructors or other leaders to demonstrate competency. The required number for each state will be set by the State Coordinator.

Comments and Recommendations

Release 2 of these slides to incorporate 2019 tax forms, screen shots from the production version of TaxSlayer and any other updates is planned for mid-December 2019. In the interim, please submit your comments/corrections/additions/deletions/suggestions through Submit a Request on the Portal.

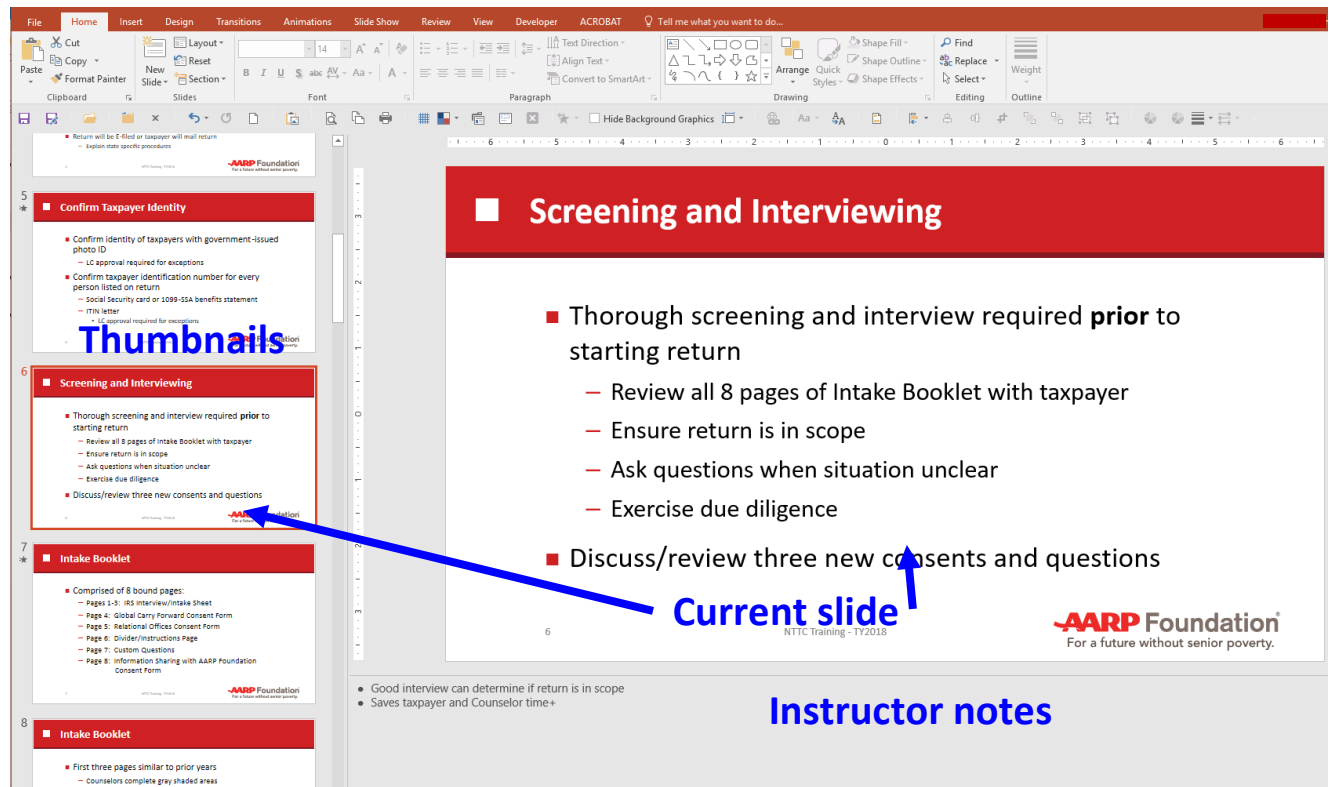
Tax Training Files

| No | Title | No | Title |
|----|----------------------------------|----|-----------------------------------|
| 01 | Introduction to Tax Law | 23 | Income Other |
| 02 | Introduction to TaxSlayer | 24 | Income Other - Medicaid Waiver |
| 03 | Course Introduction | 25 | Income Form 1099-MISC |
| 04 | Identity Theft | 26 | Adjustments to Income |
| 05 | Screening and Interviewing | 27 | Standard and QBI Deduction |
| 06 | Quality Review | 28 | Itemized Deductions |
| 07 | Filing Basics | 29 | Child and Dependent Care Credit |
| 08 | Filing Status | 30 | Education Benefits |
| 09 | Dependents | 31 | Foreign Tax Credit |
| 10 | Unique Filing Status | 32 | Child Tax Credit Other Dep Credit |
| 11 | Income Wages | 33 | Miscellaneous Credits |
| 12 | Income Interest and Dividends | 34 | Kiddie Tax and Other Taxes |
| 13 | Income State Tax Refund | 35 | Payments |
| 14 | Income Alimony | 36 | Earned Income Credit |
| 15 | Income Business | 37 | Finishing the Return |
| 16 | Income Capital Gains and Losses | 38 | Affordable Care Act |
| 17 | Sale of Real Estate | 39 | Final Steps |
| 18 | Income Retirement | 40 | Amended and Prior Year Returns |
| 19 | Income Rent and Royalty | 41 | IRS Issued Identification Numbers |
| 20 | Income Schedule K-1 | 42 | Tax Law Changes |
| 21 | Income Unemployment Compensation | 43 | Qualifying Child Charts |
| 22 | Income Social Security | 44 | Health Savings Accounts |

Attachment 1

Modifying a PowerPoint Presentation

Open the presentation in PowerPoint. In the View tab, select Normal. You should see tabs across the top, thumbnail slides in a column on the left, a single slide in the main screen, and instructor notes at the bottom.



A. Hiding a slide

1. On the thumbnail slides, select the slide(s) you want to hide.
2. Either right-click and select Hide Slide or select the Slide Show tab and then Hide Slide
3. The presentation will now skip over those slides.

B. Adding a slide

1. Inserting a blank slide
 - a) In the thumbnail list, click on the space where you want to insert the new slide
 - b) Press Enter. A new slide with the layout of the previous slide will appear.
2. Insert a slide from a different presentation
 - a) Open the other presentation

- b) Click on the thumbnail of the slide you'd like to copy. If you want to copy several slides, hold down the Shift key to select all slides in a sequence or the Ctrl key to select individual slides.
 - c) Right-click on one of the selected slides and elect Copy.
 - d) Switch to the new presentation.
 - e) In the thumbnail view, put your cursor between the two slides where you want to add the copied slide(s).
 - f) Press Paste on the Home tab or Ctrl + V or right-click and select Paste to insert the copied slides.
3. Duplicate an existing slide and edit it
- a) Right-click on the thumbnail of the slide you'd like to duplicate.
 - b) Select Duplicate Slide.
 - c) The new slide will appear immediately below the one you duplicated.
 - d) Drag the new slide up or down to its desired location and edit it.
- C. Add a screen shot
1. With the screen you want to copy on your monitor
 - a) Press Print Screen or PrtScr key (usually near the upper right-hand corner of your keyboard). A copy of the entire screen is now on your clipboard. -OR-
 - b) Press Alt+PrtScr to copy just the active window to the clipboard -OR-
 - c) If using Windows 7 or 10, open the Snipping Tool (in the Accessories folder) which allows you to select just the portion of the screen you want to copy.
 2. Open the slideshow and select the slide that you want to use.
 3. Either press Ctrl+V or right-click on the slide and select Paste Option>>Picture.
 4. Select Format the Drawing>>Crop.
 5. Drag the edges of your screenshot so only the portion you want to show is displayed. Click on Crop again.
 6. Re-size the cropped screenshot and move it into place. If you enlarge the cropped screenshot, it will get fuzzy. Better to make the item as large as possible on the original screen before you take the screenshot and then reduce it in size on the slide.
- D. Change wording
1. Highlight the text to be changed and type the new text.
 2. Select the Home tab to change the font or style.
- E. Change picture
1. Double right-click on the old picture and select Delete.
 2. Copy the new picture.
 3. Double right-click on the location and select Past Option>>Picture.
- F. Add shapes

1. From the Insert tab, select Shapes.
2. Chose a shape, then on the current slide, drag from one corner of the shape location to the other.
3. Click on the shape and on the Format tab that appears when you do so.
4. From the Format tab, you can change the color, the line width, the transparency etc. of the shape. If you plan to use many similar shapes, right-click on the shape and chose Set as Default.

G. Add animations

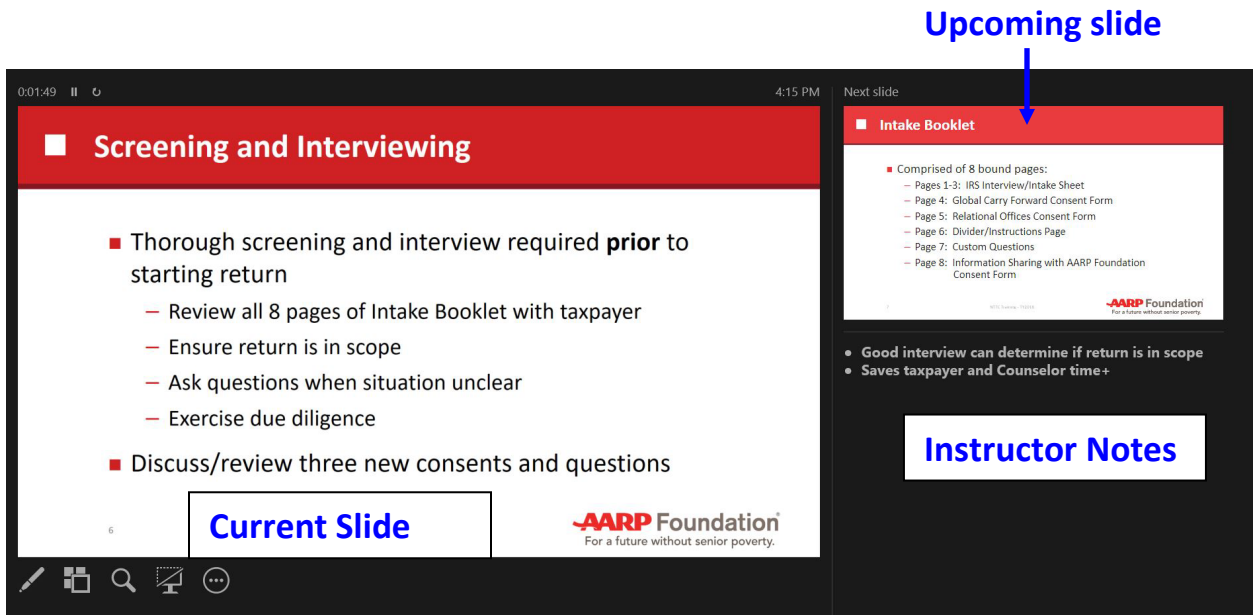
1. Select the Animations Tab>>Animation Pane.
2. Highlight the object or text that you want to animate then the animation that you want to use. It is highly recommended that you use simple animations like Appear.
3. The animation will appear in the animation pane.
4. To edit the animation, click on the pull-down arrow beside it. For example, if you want something to appear and then disappear, use the pull down menu to select Effect Option. From Effect, select After animation: "Hide on next mouse click".
5. The order of animations can be changed by changing the order in the animation pane.
6. Use the Slideshow>>From Current Slide to display the animation. ESC returns you to normal view.

H. Re-ordering the slides

1. On the View tab, select Slide Sorter.
2. Grab thumbnail of slide(s) and drag to new location.

Running a PowerPoint Presentation with Instructor Notes Showing Only on Instructor Screen

- A. Connect the computer to a second monitor or a projector (with display on both).
- B. In the Slide Show tab, check *Use Presenter View* and set *Show On* to projector or second monitor.
- C. Switch to Slide Show mode – the projected image will be the slides; the Instructor’s computer will show the current slide, the Notes and the upcoming slide.



- D. On the Instructor’s computer, adjust the size of text in the Notes section with the Zoom buttons below the Notes section.