

To All New (September 2012) Volunteers for AARP TCE Atlantic County

Most of you have attended one or the other Orientation meetings at either the AtlantiCare center in EHT on Sept. 11 or the Atlantic City Library on Sept 12. You were given an overview and background of the **Tax Counseling for the Elderly** program, general information on what we do and how, where and when we do it, the time involved for new volunteers, the schedule for the formal training and the schedule for free tax preparation next winter and early spring. The main activity for new volunteers this fall is training, starting, effectively NOW and extending in one phase or another through next January.

As you should have discovered there is a major commitment of time involved in both the training and the operational work during tax filing season. Most new volunteers, after they have been briefed as you have, choose to proceed with the training on both income tax law and the use of the tax preparation software known as '**TaxWise On line**' or **TWO**. The first phase of training is carried out by each volunteer at home by use of on-line internet materials. These are accessed at the website of TaxPrep4Free.org which we refer to as 'TP4F' for short.. For the present, everything you need can be found at

<http://ty2011.taxprep4free.org/Training/Familiarization>

This is the page that we showed you 'live' at the briefings.

We suggest that you access this page with Internet Explorer and make it a 'favorite' – it is especially handy to add it to your 'favorites bar' so you never have to type in the whole address or even hunt it up in your favorites list again. This page on the TP4F, as you have been shown at the orientations contains the 'familiarization checklist'. This checklist begins with a list of voice-over slide shows (left-click on a title to select any one) which, as you watch and listen to each one in order, take you through a comprehensive introduction to the tax preparation software/computer program that we use to do tax returns. The whole series might take several hours of your time all told but it is essential for each of you (and for us, the instructors) that each of you view and hear all of the first eight videos (through 'Intro to TWO') before October first. Shortly thereafter we will ask you to complete the rest of the familiarization videos down through Familiarization Problem Fam – 01 Andersen. These will show you how to log on to the TaxWise training program and how to prepare a simple tax return using this software.

In the meantime, around October first, we will assign each of you a 'User Name' (STUDENT##) and the rest of the information you need to log on to TWO 'live' in order to do the last seven steps in familiarization, each of which is a relatively

simple complete tax return. EVERYTHING you need to know in order to do these will be available when you click on the Fam item in the checklist, from Fam 02, Conway on down through Fam 08 Rosemont. You will be assigned a Coach, an experienced tax preparer, whom you can call or e-mail, who will be able to help you with anything you may have difficulty with anywhere along the line and who will be able to review your work. These exercises are currently being updated for use with TWO 2011 Training software. When the revised FAM exercises become available we will notify you and provide complete instructions for doing these practice returns with TWO.

The purpose of the familiarization series is to get you acquainted and comfortable with the TaxWise software. In order to do that you do not need any more knowledge of TAX LAW than you almost certainly already have. The goal is to COMPLETE the Familiarization checklist and all of the FAM tax returns using TaxWise before your first formal training class in November. At that time we will start teaching both tax law AND TaxWise in every class. We begin every session with a presentation/discussion/demonstration of a part of the tax law, in the order that the universal federal individual income tax form, the Form 1040, would lead you to expect - line by line through all seventy-some lines - and end the session with each student completing the related part of the KENT 'tax return from hell' individually, using TWO training, live on line, right in the classroom. We, and others, have found the familiarization process to be absolutely invaluable as preparation for the formal course. You should have the better part of a month to complete the FAM returns before school starts.

You will get further e-mailed information and instructions from time to time from here on out so it is most advisable to check your e-mail regularly.

Atlantic County AARP TCE Training Staff.