

Introduction to Familiarization

Welcome

- Welcome to the free tax preparation program
- If you have reached this point you should have been contacted by your coach or training coordinator and discussed general information about the program and directed you to the TaxPrep4Free.org website.
- This module will give you additional information that you will need to complete your training.



Orientation

- If you have not completed the Orientation module please do so before continuing.

General Help

- Very Important: Every effort has been made to allow you to complete your training on your own, but if you are having trouble **please do not hesitate to call your training coordinator or coach.**
- However, each organization will have different ways for you to complete your training that your coordinator should have explained to you, for example some will require in class participation and others have special requirements . Please follow their guidelines.

Cheat Sheet

- During your training you will be asked to review chapters in IRS reference material, review slide presentations, etc., and to work tax problems.
- Your training coordinator should have provided you with a “cheat sheet”, either in the mail, by email or in person.
- The Cheat Sheet gives you TaxWise login information, the training syllabus for “how to use the TaxWise software (Familiarization)” and a listing of the problems that you will need to work.
- The problems should be worked in order and reviewed by your coach when completed.



Tax Problems

- Each problem consists of general tax payer information (Interview/Intake Sheet) which you will need to complete the tax return.
- Not all tax payer information is provided on a “real” Interview/Intake sheet, so the problems include interview notes which were taken while “interviewing” the problem’s tax payer.
- All of this information will be used in completing a tax return.



Refund Monitor

- In addition, each problem has a guide (Refund Monitor) that you should use to lead you through the problem.
- The Refund Monitor also contains a step by step listing of the necessary forms that the problem requires, the answers to the problem, and copies of the completed tax return.
- When starting a problem it would be helpful if you had the Interview/Intake sheet, the interview notes, and the refund monitor in front of you.



Answers

- As you work through the problems, following the refund monitor, you should be checking your tax return with the forms provided in the refund monitor.
- If the forms do not match, review the refund monitor forms carefully to see where the error occurred.
- If you cannot find the error, contact your training coach for assistance.



Completion of Familiarization Module

- Once you have reviewed all the material in the Familiarization module, worked all the problems, and had them reviewed by your coach, you are ready to proceed to the next step.
- The next step is Tax Law training.

