

## Prospective Volunteer Videos

December 4, 2020

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| <b>Basic Tax Law and Tax-Aide Resources</b>        | <b>Description</b>  | <b>Audience /minutes</b>     | <b>Link</b>   | <b>Version Date</b> |
|--|---|------------------------------|---|---------------------|
| Intro to Federal Tax Law                           | An entry level discussion of Federal Law taxation   | New Volunteers<br>8          | <a href="#">Intro to Federal Tax Law</a>                                | 8/21/2020           |
| Jeff Bogart's Toolbox                              | A walkthrough of the tax preparation tools made available by Jeff Bogart, a tax volunteer from Colorado | All<br>12                    | <a href="https://youtu.be/XGP5QtGG4Pk">https://youtu.be/XGP5QtGG4Pk</a> | 9/9/2020            |
| Scope Manual                                       | Importance of Scope and how to search using Scope Manual  | All<br>6                     | <a href="https://youtu.be/L0rgWXUj3B0">https://youtu.be/L0rgWXUj3B0</a> | 9/21/2020           |
| Pub 4012   | Using NTTC Modified 4012 which is the electronic version of Volunteer Resource Guide                    | All<br>16                    | <a href="https://youtu.be/z-F-2y2cplw">https://youtu.be/z-F-2y2cplw</a> | 11/9/2020           |
|  |   |                              |   |                     |
| <b>Advanced Tax Law Required for Advanced Test</b> | <b>Description</b>  | <b>Audience /minutes</b>     | <b>Link</b>   | <b>Version Date</b> |
| MWP paid on W2                                     | Medicaid Waiver Payments paid on Form W2  | Experienced Volunteers<br>17 | <a href="https://youtu.be/me6X9YWpHgw">https://youtu.be/me6X9YWpHgw</a> | 9/25/2020           |
| HSA Full Year                                      | Health Savings Account Contributions: Full Year   | All<br>13                    | <a href="https://youtu.be/BntZXpaWnSU">https://youtu.be/BntZXpaWnSU</a> | 9/15/2020           |
| HSA Distributions                                  | Health Savings Account Distributions  | All<br>15                    | <a href="https://youtu.be/LZ2gJWMQ_PE">https://youtu.be/LZ2gJWMQ_PE</a> | 9/15/2020           |

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| <b>Tax Law: Advanced Topics</b>           | <b>Description</b>   | <b>Audience /minutes</b>     | <b>Link</b>   | <b>Version Date</b> |
|---|--|------------------------------|---|---------------------|
| Bogart Education Calculator               | How to Use the Bogart Calculator to Determine and Optimize Education Credits | Experienced Volunteers<br>16 | <a href="#">Education Vincent 1</a>                                     | 8/31/2020           |
| Qualified Charitable Distributions - IRAs | IRA changes for TY2020 including QCD   | Experienced Volunteers<br>10 | <a href="#">New Tax Law IRAs</a>  | 8/21/2020           |
| HSA Part Year                             | Health Savings Account Contributions: Part Year; Comprehensive topic         | Experienced Volunteers<br>15 | <a href="https://youtu.be/QTwMtlGsoyI">https://youtu.be/QTwMtlGsoyI</a> | 9/15/2020           |
| HSA Married                               | Health Savings Account Contributions: Married; Comprehensive topic           | Experienced Volunteers<br>15 | <a href="https://youtu.be/rgcSBvdCcAs">https://youtu.be/rgcSBvdCcAs</a> | 9/15/2020           |
| State Tax refund                          | When is State Refund Taxable?  | Experienced Volunteers<br>15 | <a href="https://youtu.be/Kx3tMcrCssE">https://youtu.be/Kx3tMcrCssE</a> | 9/21/2020           |
| Railroad Retirement Benefits              | Railroad Retirement Pension, green and blue forms                            | Experienced Volunteers<br>10 | <a href="https://youtu.be/y57UFRvMvHw">https://youtu.be/y57UFRvMvHw</a> | 10/6/2020           |
| Amended Returns Part 1                    | Amendments for tax returns that were done at your site                       | Experienced Volunteers<br>20 | <a href="https://youtu.be/AMozsKu96_g">https://youtu.be/AMozsKu96_g</a> | 10/30/2020          |

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| <b>New Tax Law</b>                               | <b>Description</b>  | <b>Audience /minutes</b> | <b>Link</b>   | <b>Version Date</b> |
|--|---|--------------------------|---|---------------------|
| New Tax Law Forms                                | Presentation of new IRS forms   | All<br>2                 | <a href="#">New Tax Law New Forms</a>   | 8/21/2020           |
| Tax Law Changes - EIP (Economic Impact Payments) | Presentation regarding EIP and tax return preparation                   | All<br>4                 | <a href="https://youtu.be/YaG500z0yHQ">https://youtu.be/YaG500z0yHQ</a>   | 9/21/2020           |
| Tax Law Changes - Schedule C                     | Presentation regarding Self-Employment (Schedule C) changes for TY2020  | All<br>4                 | <a href="#">New Tax Law Schedule C</a>  | 8/21/2020           |
| Tax Law Changes: Deductions (& Adjustments)      | Presentation of changes to income deductions and adjustments for TY2020 | All<br>3                 | <a href="#">New Tax Law Deductions</a>  | 8/21/2020           |
| Tax Law Changes - IRAs                           | Presentation of IRA changes for TY 2020                                 | All<br>10                | <a href="#">New Tax Law IRAs</a>  | 8/21/2020           |
| Tax Law Changes - Education Benefits             | Presentation of Education Benefits changes for TY 2020                  | All<br>3                 | <a href="#">New Tax Law Education</a>   | 9/4/2020            |
| IRS draft Tax Forms                              | Link to latest tax forms from IRS                                       | Instructors<br>--        | <a href="https://apps.irs.gov/app/picklist/list/draftTaxForms.html">https://apps.irs.gov/app/picklist/list/draftTaxForms.html</a> | N/A                 |

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| Tax Slayer Online (TSO)   | NTTC Workbook<br>Evans Bryant Data Entry | Audience /minutes | Link  | Version Date |
|---|--|-------------------|---|--------------|
| Evans Bryant is a Training Exercise intended for classroom use. Therefore, the Workbook is missing some information that would be part of the Interview. These additional interview notes are included in the videos. |  |                   |   |              |
|   | Intake and Interview                     | All/ 20           | <a href="https://youtu.be/dXs99LIUddA">https://youtu.be/dXs99LIUddA</a> | 9/8/2020     |
|   | Demographics and Consents                | All/ 6            | <a href="https://youtu.be/AOEQGC6KYyI">https://youtu.be/AOEQGC6KYyI</a> | 9/27/2020    |
|   | Basic Info                               | All/ 10           | <a href="https://youtu.be/6PbURKJmLXk">https://youtu.be/6PbURKJmLXk</a> | 9/20/2020    |
|   | Wages                                    | All/ 8            | <a href="https://youtu.be/hRHqz-ojSLo">https://youtu.be/hRHqz-ojSLo</a> | 9/7/2020     |
|   | Interest and Dividends                   | All/ 4            | <a href="https://youtu.be/6VYpKAKH5YM">https://youtu.be/6VYpKAKH5YM</a> | 9/4/2020     |
|   | Pensions and Social Security             | All/ 13           | <a href="https://youtu.be/xQZQw7AuhOE">https://youtu.be/xQZQw7AuhOE</a> | 9/13/2020    |
|   | IRAs                                     | All/ 5            | <a href="https://youtu.be/zFSgGIE2_D8">https://youtu.be/zFSgGIE2_D8</a> | 9/18/2020    |
|   | Schedule A                               | All               | waiting for 2020 TSO Practice Lab                                       |              |
|   | Schedule C                               | All               | waiting for 2020 TSO Practice Lab                                       |              |
|   | Schedule E                               | All/ 5            | <a href="https://youtu.be/UY-1GLEd92k">https://youtu.be/UY-1GLEd92k</a> | 9/28/2020    |
|   | Education                                | All/ 7            | <a href="https://youtu.be/vJ-NNA8CjRg">https://youtu.be/vJ-NNA8CjRg</a> | 8/31/2020    |
|   | Schedule D Brokerage Statements          | All/ 11           | <a href="https://youtu.be/uf2MD2FSG6c">https://youtu.be/uf2MD2FSG6c</a> | 8/31/2020    |
|   | Schedule D Carryforward and Inherited    | All/ 6            | <a href="https://youtu.be/UG4wuTOgG0I">https://youtu.be/UG4wuTOgG0I</a> | 8/31/2020    |
|   | Other Income                             | All/ 7            | <a href="https://youtu.be/Q_eKnLxeeko">https://youtu.be/Q_eKnLxeeko</a> | 9/4/2020     |
|   | Adjustments                              | All/ 5            | <a href="https://youtu.be/u1EdvQIR9QY">https://youtu.be/u1EdvQIR9QY</a> | 9/4/2020     |
|   | Childcare and Dependent Care Credits     | All/ 8            | <a href="https://youtu.be/3gQgMqTDtGI">https://youtu.be/3gQgMqTDtGI</a> | 9/20/2020    |
|   | Finishing the Return                     | All/ 14           | <a href="https://youtu.be/TZYR7MOtLHg">https://youtu.be/TZYR7MOtLHg</a> | 10/4/2020    |