

# TCS Training Guidelines

September 19, 2011

**Summary.** This document provides guidelines for TCS training of their district TCs and EROs. It describes the approach, training material required, and gives a suggested training agenda.

**Introduction.** The role and magnitude of technical support has changed significantly since the introduction of electronic filing and the transition from paper to computer-prepared returns. In the past, a few technical people could easily support the computers necessary to prepare and electronically file returns. Today, over 90% of returns prepared by AARP Tax-Aide are electronically filed and the technical requirements continue to increase. For example, encryption is now required to protect against unauthorized disclosure of taxpayer information. Also, use of TaxWise Online (TWO) or networking of computers is strongly encouraged to optimize site operation and to protect taxpayer information. Training of technical volunteers is very important to the success of the AARP Tax-Aide program.

TCSs are primarily responsible for training TCs. TCSs and TCs are responsible for training EROs. In all cases, the state Training Specialist should assist with instruction to the extent possible.

**Training Approach.** Training for new TCSs is conducted by the National Technology Committee each year, generally in July.

TCSs, with support as needed from the TRS, should conduct TC and ERO training annually, preferably at a central location. Some States find it convenient to do this in conjunction with Instructor training. Where local circumstances dictate, others, such as Instructors, should contribute to TC and ERO training.

A suggested set of ERO training slides is available on the AARP Extranet. This set of slides, (developed jointly by the NTC and NTTC) is intended as a curriculum that can be modified or used as deemed necessary. In states that have a state income tax, the TCS should work with the state department of revenue's e-filing coordinator to determine how the AARP Tax-Aide program should mesh with their state procedures and incorporate that information into the ERO training.

ERO training should cover all aspects of setting up site computers, transmitting returns and resolving rejects. The NTTC recommendation is that a minimum of four (4) hours of training be provided to new EROs in each district. Experienced EROs may not require as much. Training should emphasize security and incorporate a process log to ensure all returns are transmitted, and accepted by the IRS and any state department of revenue, where applicable.

New EROs should be assigned a mentor to assist them with these duties and to answer questions, especially during the early part of the season. At sites having multiple EROs (say, for different days of the week) communication among the EROs and attention to good record keeping are important. These aspects are sometimes overlooked and mentors can help with them. Mentors should have previously served as ERO or have direct experience in assisting an ERO. Obviously, ERO Training will vary based on the needs of the district.

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**Technical Training Material.** The primary IRS technical guidance for training TCSs and TCs is Publication 3189 “*Volunteer e-file Administration Guide*”. This document is designed to assist volunteer e-file administrators in implementing the correct electronic filing procedures at e-file sites.

This Technology section of the AARP Extranet (<http://www.aarp.org/sk/taxaide/index.html>) is the primary technical guidance source provided by AARP Tax-Aide. In addition, technical information is distributed via AARP Tax-Aide Technical Bulletins.

***It is important to note that where IRS Publication 3189 and AARP Tax-Aide publications and related information differ, the AARP-provided materials must prevail.***

## Sample TC Training Agenda

1. INTRODUCTION
  - a. Meeting agenda
  - b. Prior year accomplishments
  - c. Goals for current year
  - d. Summary of what’s new
  
2. TECHNOLOGY COORDINATOR FUNCTIONS
  - a. Hardware
  - b. Software
  - c. Training
  - d. Administration
  - e. Maintaining inventory records
  - f. Other
  - g. Tools
  - h. Calendar
  
3. SECURITY
  - a. Need for security
  - b. Security do’s & don’ts
  - c. Encryption
  - d. Passwords
    - i. Constraints
    - ii. Cautions
    - iii. Dissemination
  - e. Ban on wireless communications for TaxWise Desktop
  - f. Use of antivirus software
  - g. Physical security
  - h. Data retention
  - i. Data removal

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## 4. HARDWARE

- a. Available hardware
- b. Inventory
- c. Allocation process
- d. Ordering computers & printers
- e. Software Tune-ups

## 5. TAXWISE

- a. Comparison of Desktop and Online
- b. Changes and new features
- c. Hardware requirements
- d. IRS/CCH software guidelines
- e. Ordering process and schedules

## 6. EFINs

- a. EFIN types
- b. Requesting special EFIN's
- c. EFIN on Fulfillment Confirmation Slip
- d. EFIN Authentication (*TaxWise* Desktop only)
- e. Setting up multiple EFINs on a single computer (Desktop)

## 7. SITE ORGANIZATION AND OPERATION

- a. Setting tax form defaults
- b. Entering Site ID
- c. Personal ID numbers (PIN's)
- d. Using Preparer's Use fields
- e. Setting print packet defaults (Desktop)
- f. Configuring printers
- g. Organizing Quality Review
- h. Taxpayer data retention (*TaxWise* Desktop only)
- i. Cloning *TaxWise* (Desktop)
- j. Loading prior-year Proforma data
- k. Use of removable data storage devices and media (Desktop)
- l. Configuring computers for use in Multiple Roles (Desktop)

## 8. NETWORKING

- a. Why?
  - i. *TaxWise* Desktop client/server
  - ii. *TaxWise* Online Internet Connectivity
  - iii. Printer sharing
- b. How?
  - i. Wired Ethernet
  - ii. Wireless (printers only)

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## 9. ELECTRONIC RETURN ORIGINATORS (TRANSMITTERS)

- a. Training EROs is a joint effort of TCs and Instructors
- b. Differences between *TaxWise* Desktop and Online for EROs

## 10. RESOURCES

- a. IRS publications, primarily Pub 3189
- b. AARP Tax-Aide
  - i.
  - ii. Extranet web site
  - iii. CyberTax email (subscription)
  - iv. Technology Bulletin emails
- c. CCH (vendor of the *TaxWise* program)
  - i. *TaxWise* User Guides (for Desktop and Online versions)
  - ii. *TaxWise* Train-The-Trainer classes
- d. Tax-Aide Volunteer Operations Group (T-VOG) on Yahoo.com

## 11. EXPENSES

- a. Codes “S” and “R”
- b. AARP will reimburse
- c. AARP will not reimburse
- d. Listed Consumables

## 12. TECHNOLOGY Q&A