

# Sample TC Training Agenda

1. Introduction
  - a. Meeting agenda
  - b. Accomplishments
    - i. Total federal returns
    - ii. E-filed returns
  - 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
    - i. TrueCrypt
    - ii. SecureDoc
  - d. Passwords
    - i. Kinds of passwords
      - a) BIOS
        1. Administrator or Setup
        2. Power-on
      - b) SecureDoc
      - c) Windows User Log-in
        1. Volunteer
        2. Administrator
      - d) TrueCrypt Volume
      - e) TaxWise Desktop user groups
        1. Admin & ERO
        2. Counselors
      - f) TaxWise Online user roles
        1. Administrator
        2. SuperUser
        3. TemplateManager
        4. ReturnPreparer
    - ii. Constraints
    - iii. Cautions
    - iv. Dissemination

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- e. Ban on wireless communications
  - f. Use of antivirus software
  - g. Physical security
  - h. Data retention
  - i. Data removal
    - i. Wipe Disk for IRS Computer Loan Program computers
    - ii. TPClear for all other computers
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
    - i. SIDN & EFIN
    - ii. Need for efficient use
    - iii. Ordering process and schedules
6. EFINs
- a. EFIN types
    - i. Normal EFINs with REG Codes
    - ii. Transmit EFINs with XMIT Codes (TaxWise Desktop only)
    - iii. Relational EFINs (no longer applicable)
  - 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
    - i. NTC-suggested defaults
    - ii. Downloadable & installable (TaxWise Desktop only)
    - iii. TWO Templates
  - b. Entering Site ID
  - c. Personal ID numbers (PIN's)
    - i. Self-select PIN's (not used)
    - ii. Practitioner PINs
  - d. Using Preparer's Use fields
    - i. User-defined history lists
    - ii. Locking list limits entries

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- iii. Making entry “required”
  - e. Setting print packet defaults (Desktop)
  - f. Configuring printers
  - g. Organizing Quality Review
  - h. Taxpayer data retention (TaxWise Desktop only)
    - i. Tracking retention status
    - ii. Using preparer’s use field to record retention status
  - i. Cloning TaxWise (Desktop)
    - i. Advantages/disadvantages
    - ii. “how-to” references
  - j. Loading prior-year Proforma data (Desktop)
  - k. Use of removable data storage devices and media (Desktop)
    - i. Flash drives
    - ii. External hard disk drives
    - iii. CDs, DVDs, etc.
  - 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
      - a) With router
      - b) Without router
    - ii. Wireless
- 9. Electronic Return Originators (transmitters)
  - a. Training EROs: a joint effort for Instructors and TCs
  - b. Differences between TaxWise Desktop and Online for EROs
- 10. Resources
  - a. IRS publications, primarily Pub 3189
  - b. AARP Tax-Aide
    - i. Technology Management Guide
    - ii. ExtraNet web site – Technology page
    - 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
      - a) Live classroom sessions
      - b) Webinars
      - c) Register through IRS SPEC
  - d. Tax-Aide Volunteer Operations Group

## **Sample TC Training Agenda**

- i. T-VOG Yahoo! group
- ii. Collaborative group for volunteer leaders
- iii. NOT an official AARP Tax-Aide communication channel

### **11. Expenses**

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

### **12. Technology Q&A**