



# TRAINING BEYOND THE CERTIFICATION

## Training for all staff

**Customer Service and De-escalation** (in-person) - tips for handling difficult situations and clients

**Serving Deaf and Hard of Hearing Clients** (online) - how to communicate without an interpreter effectively, what to expect when working with an interpreter

**About ITINs and Form W-7** (online) - what is an ITIN, application qualifications, how to refer to the ITIN team, what to do when the W2 has an SSN but the TP has an ITIN

**Quality Review Certification Course** (online) - practice quality reviewing, and tips to prevent tax returns

**How to Pause an “In Progress” Return** (online) - how to properly close the tax return when it is not moving to the QR phase, the Return Visit Slip

**Troubleshooting** (online) - whom to contact in emergencies, what is the plan B

**Slack** (online) - explanation of the channels and how to reach the appropriate team, how to message safely no PII in Slack

**State Tax Returns (online)** - what states file income taxes, how to recognize if a state return is needed



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## *Training for 1st and 2nd year staff*

**Focused Intake Interview Training** (in-person) - provides practice scenarios, a deep dive into tax forms, scope of service, and partner programs

**Education Credits** (in-person) - from a beginner's perspective, how to incorporate our process documents, what are allowable expenses, are scholarships/grants allowed for living expenses, what is kiddie tax

**Self-Employment** (in-person) - from a beginner's perspective, how to incorporate our process documents, how to prevent common mistakes, allowable business mileage and expenses

**Focused QR Training** (in-person) - QR basics, tips on quality reviewing, common rejects and how to prevent them, how to read a 1040, how to explain why there is a balance due

**Technology Training** (in-person) - learn to scan and print documents from a cell phone

**Transmitting** (in-person) - learn to verify returns are ready for transmission, resolving rejects



# *TRAINING BEYOND THE CERTIFICATION*

## *Training for staff 3<sup>rd</sup> year and beyond*

**Education Credits** (in-person) - advanced-level discussion on maximizing the credit, preventing kiddie tax, and AOC vs LLC

**Self-Employment** (in-person) - advanced-level discussion, reminders, and Q&A

**Transmitting** (in-person) - changes, updates and reminders

## *Training for Specialized Teams*

**TaxSlayer Activation** (online) - how to activate users across all sites, assign TS privileges

**Focused Training for the Transmitting Team** (hybrid) - understanding IRS reject codes, notifying clients about the rejects, how to resolve rejects, running TaxSlayer reports

**Focused Training for the Phone Team** (in-person) - overview of roles, logging calls, using your resources, using the calling software, how to schedule on appointment