

Core Setup Guide Topics

- 1) Goals of core phase of training
 - Learn Federal tax law
 - Learn NJ tax law and differences from Federal
 - Learn how to enter tax return using TaxSlayer
 - Learn available reference sources and how to use them
 - Prepare you for IRS Certification Test

- 2) Setting up for a core problem
 - Essential documents to print
 - Pre-interview intake/interview sheet
 - Problem scenario
 - Blank NJ Checklist
 - Set up tabs
 - Practice lab
 - TaxPrep4Free.org
 - Pub 4012 (NJ Edition)

- 3) Core Problem Process Overview
 - Interview
 - Listen to a client interview and annotate Intake/NJ Checklist
 - Compare with published post-interview markups
 - Preparation
 - For each Scenario Step:
 - Watch Lesson (Tax Law + TaxSlayer Entry)
 - Enter into TaxSlayer
 - Check Refund Monitor
 - Compare entered printed return to published printed return

- 4) Reference Sources
 - 4012 IRS, NTTC and NJ versions
 - Use NJ Version as it contains NTTC & NJ Special Topics
 - TaxPrep4Free.org
 - Primary Resources
 - IRS: 1040 Instructions and Pub 17
 - NJ: NJ 1040 Instructions and Bulletin GIT-5
 - Other Resources
 - IRS Pub 4491
 - IRS Link & Learn

- 5) Chrome PDF Tips
 - Using Icon Commands
 - Using Keyboard Shortcut Commands
 - Navigating Pub 4012 (NJ Edition)