

ORTaxVolunteers.org: Training and Tax Law Library

This is a log of the additions and updates to the *Training and Tax Law Library* with the most recent listed last. There is a separate Table of Contents that lists all documents and files in this library.

Title	Library Folder/Links	Date	Notes
CF Interpreter Certification Diagram	OR1>Training>Webcontent PPT: CF Interpreter Certification Diagram.pptx PDF: CF Interpreter Certification Diagram.pdf	11.07.23	Updated document for change to IRS Website link. Updated: Kathy G
2023 Client Facilitator Training	OR1>Training>Webcontent PPT: 2023 Client Facilitator Training.pptx PDF: 2023 Client Facilitator Training.pdf	11.07.23	Updated document for change to IRS Website link. Updated: Kathy G
2023 OR New Volunteer Information Session	OR1>Training>Webcontent PPT: 2023 OR New Volunteer Information Session.pptx PDF: 2023 New Volunteer Information Session	11.06.23	Updated for change to only two Tax-Aide LMS Courses. Changed IRS Link and Learn to new link. Updated: Kathy G
2023 Tax-Aide New Volunteer Information Session	OR1>Training>Webcontent PPT: 2023 Tax-Aide New Volunteer Information Session.pptx PDF: 2023 New Volunteer Information Session	11.06.23	Updated document for change to only two courses for LMS. Changed IRS Link and Learn to new link. Updated: Kathy G

Title	Library Folder/Links	Date	Notes
2023 OR Orientation	OR1>Training>Webcontent PPT: 2023 OR Orientation.pptx PDF: 2023 OR Orientation	11.06.23	Updated document for change to link in Moodle and IRS Link and Learn Website Link. Updated: Kathy G
2023 Tax-Aide Orientation	OR1>Training>Webcontent PPT: 2023 Tax-Aide Orientation.pptx PDF: 2023 Tax-Aide Orientation	11.06.23	Updated document for change to link in Moodle and IRS Link and Learn Website link. Updated: Kathy G
2023 OR CF Int Learning Map	OR1>Training>Webcontent Word: 2023 OR CF Int Learning Map.docx PDF: 2023 OR CF Int Learning Map.pdf	11.06.23	Updated document for change to link in Moodle and new IRS Link and Learn Website. Updated: Kathy G
2023 OR Tax Preparer Learning Map	OR1>Training>Webcontent Word: 2023 OR Tax Preparer Learning Map.docx PDF: 2023 OR Tax Preparer Learning Map.pdf	11.06.23	Updated document for change to link in Moodle. Updated: Kathy G
Tax Preparation Certification Training Diagram	OR1>Training>Webcontent PPT: Tax Preparation Certification Training Diagram.pptx PDF: Tax Preparation Certification Training Diagram.pdf	11.06.23	Updated document for change to IRS Website link. Updated: Kathy G

Title	Library Folder/Links	Date	Notes
2023 IRS Advanced Test Tip Sheet	OR1>Training>Webcontent Word: 2023 IRS Advanced Test Tip Sheet.docx PDF: 2023 IRS Advanced Test Tip Sheet.PDF	11.17.2023 11.19.2023 11.23.2023 11.21.2023 11.27.2023 11.28.2023 11.29.2023 12.01.2023 12.17.23 12.18.23	Created Document. Updated it to reflect the new IRS LinkandLearnTaxesCertification.com site. Added issue with clearing cache and 1040 view. Updated TaxSlayer and Link & Learn issues with new problems Removed information that the IRS site was in test mode until 11/27/23. Added information when password reset fails for returning volunteers. Updated TaxSlayer issues. Updated to reflect IRS Test Site Down until 12/11/2023 Updated: Kathy G Updated to reflect IRS LinkLearnCertification.com is working. Updated TaxSlayer Bugs that have been resolved. Corrected scenario numbers. Updated with the latest list of TaxSlayer Bugs. Updated: Kathy G
Title	Library Folder/Links	Date	Notes

2023 OR CF Int Learning Map	OR1>Training>Webcontent Word: 2023 OR CF Int Learning Map.docx PDF: 2023 OR CF Int Learning Map.pdf	11.23.23	Updated to reflect 2023 versions of the IRS Pubs available and to include new Link and Learn Guide to using the new LinkLearnTaxesCertification.com Updated: Kathy G
2023 OR Tax Preparer Learning Map	OR1>Training>Webcontent Word: 2023 OR Tax Preparer Learning Map.docx PDF: 2023 OR Tax Preparer Learning Map.pdf	11.23.23	Updated to reflect 2023 versions of the IRS Pubs available and to include new Link and Learn Guide to using the new LinkLearnTaxesCertification.com Updated: Kathy G
CF Interpreter Certification Diagram	OR1>Training>Webcontent PPT: CF Interpreter Certification Diagram.pptx PDF: CF Interpreter Certification Diagram.pdf	11.07.23	Updated document for change to IRS Website link. Updated: Kathy G
2023 Client Facilitator Training	OR1>Training>Webcontent PPT: 2023 Client Facilitator Training.pptx PDF: 2023 Client Facilitator Training.pdf	11.07.23	Updated document for change to IRS Website link. Updated: Kathy G
Title	Library Folder/Links	Date	Notes

2023 OR Practice Problems	OR1>Training>Webcontent Word: 2023 Oregon Practice Problems.docx PDF: 2023 Oregon Practice Problems.pdf	12.28.2023	Created document with the details for the Oregon Practice Problems. Updated: Kathy G
Homestretch Template	OR1>Training>Webcontent Powerpoint: Homestretch Template.pptx	01.03.2024	Added 2024 Draft Homestretch Template for DC's. Updated: Bethanne Felder
Dependent Sharing Spreadsheet	OR1>Training>Webcontent Excel: dependent-sharing-rev2.xlsx	01.07.2024	Added Spreadsheet for tax counselors with clients who have complex families. Updated: Mary Emerson
2023 OR Tax Preparer Learning Map	OR1>Training>Webcontent Word: 2023 OR Tax Preparer Learning Map.docx PDF: 2023 OR Tax Preparer Learning Map.pdf	01.12.24	Clarified need for everyone to "Enrol" in Moodle, not just new volunteers. Updated status of Link & Learn Updated: Kathy G
Title	Library Folder/Links	Date	Notes

Paid Leave Oregon	OR1>Training>Webcontent Word: Paid Leave Oregon PDF: Paid Leave Oregon.pdf	02.02.2024 02.06.2024 02.27.2024	Procedure to handle the new Oregon Leave. We don't have guidance from the IRS, so we did our best to determine how to handle this new program from a tax perspective. Updated 1099-G to 1099-MISC on Medical Leave (brain fog!) Noticed we accidentally said Box 1 instead of Box 3 on the 1099 Misc. Created: Kathy G, Kathy P and Cory