




## Lesson Plan

### Completing the Return

Time Required: 15 minutes

Introduction	Objectives	Topics
This lesson covers insights and information for concluding your interview with the taxpayer.	Understand how to: <ul style="list-style-type: none"><li>• Assemble the taxpayer's copy of the tax return</li><li>• Identify the records the site maintains</li><li>• Explain to taxpayers which records they should maintain</li><li>• End the interview</li></ul>	 Printing and Storing Returns Recordkeeping Closing the Contact

### Key Terms

**Electronic Filing (e-file):** The computer transmission of a tax return directly to the IRS.

**Form W-4:** Employee's Withholding Allowance Certificate, used by an employer to determine how much to withhold from an employee's paycheck for federal income tax purposes.

**Withholding Allowance:** Claimed by an employee on Form W-4. An employer uses the number of allowances claimed, together with income earned and marital status, to determine how much income tax to withhold from wages.

**Withholding Tax:** Income tax is withheld from the pay of most employees. Income tax may also be withheld from gambling winnings, pensions/annuities, unemployment compensation, and certain federal payments, such as social security. In some cases, income tax may be withheld on other types of income, such as interest or dividend income.

### Teacher Tips

#### Guidelines for Lesson

Guideline	Instructor Notes	Presentation Aids
Lesson background info	<b>Review</b> the online demo of TaxSlayer on Finishing & Signing an e-filed Return, Electronic Filing, and Printing Returns.	<b>TaxSlayer® Demo:</b> From the Practice Lab, select: <ul style="list-style-type: none"><li>• TaxSlayer IRS training</li><li>• Click the appropriate demo.</li></ul>
Provide details and engage the students	<b>Discuss</b> all tips and cautions in detail.  <b>Ask</b> students to read and/or role-play examples.  <b>Review</b> the various issues that may come up for a volunteer concluding an interaction with a taxpayer.	<b>Internet:</b> Link & Learn Taxes (L&LT) Completing the Return

## Topic-specific Tips

Topic Name	Instructor Notes	Presentation Aids
Introduction	<p><b>Review</b> lesson objectives.</p> <p><b>Emphasize</b> that the way an interview concludes can impact taxpayers' attitude toward the taxpaying experience and their satisfaction with the volunteer tax return assistance program.</p> <p><b>Review</b> list of references.</p> <p><b>State</b> the presentation time.</p>	<p><b>Visuals:</b></p> <p><a href="#">Pub 4012</a>, Finishing the Return, Using TaxSlayer Pro Online, and Deductions tabs</p> <p><b>Internet:</b></p> <p>L&amp;LT Completing the Return</p>
Printing and Storing Returns	<p><b>Ask</b> students to explain the steps required to print the taxpayer's tax return.</p> <p><b>Emphasize</b> that every taxpayer must receive a complete copy of their return before leaving.</p> <p><b>Emphasize</b> that it will be important for taxpayers to bring a copy of this year's return to next year's appointment.</p> <p><b>Review</b> the steps required in TaxSlayer to print the return from Pub 4012.</p> <p><b>Review</b> the steps required in TaxSlayer to distribute the return from Pub 4012.</p>	<p><b>Visuals:</b></p> <p><a href="#">Pub 4012</a>, Finishing the Return tab and Using TaxSlayer Pro Online tab:</p> <ul style="list-style-type: none"> <li>• Printing the Tax Return</li> <li>• Distributing Copies of the Return</li> </ul>
Recordkeeping	<p><b>Ask</b> students to provide examples of documents that taxpayers should keep for at least three years.</p> <p><b>Review</b> what records taxpayers must keep to prove their income and expenses.</p> <p><b>Advise</b> volunteers to tell taxpayers to keep a copy of their documents for at least three years.</p> <ul style="list-style-type: none"> <li>• Form 1040 with all forms, schedules and attachments</li> <li>• All tax-related documents including Forms W-2</li> <li>• E-filed returns</li> </ul>	<p><b>Visuals:</b></p> <p><a href="#">Pub 4012</a>, Partner Resources tab:</p> <ul style="list-style-type: none"> <li>• Recordkeeping</li> </ul> <p><b>Internet:</b></p> <p>Tax Topic: <a href="#">Recordkeeping</a></p>

	<b>Inform</b> students about the types of data that will be stored by the volunteer site.	
Closing the Contact	<p><b>Review</b> the final steps a volunteer should take to conclude an interaction with a taxpayer.</p> <p><b>Ask</b> students to role-play concluding the interview.</p> <p><b>Remind</b> volunteers that they should explain to taxpayers how the e-file process works.</p> <p><b>Ask</b> students to give reasons why an e-file may be rejected, and what to do if it happens.</p>	<p><b>Internet:</b></p> <p>Tax Topic: <a href="#">Checklist of Common Errors When Preparing Your Tax Return</a></p>
Skills Workout	<b>Review</b> the Skills Workout exercises with the class.	<p><b>Visuals:</b></p> <p>L&amp;LT Completing the Return: Click Certification Warm Up icon to review the exercises</p>

### References

Pub 4012	<a href="#">Pub 4012</a> , Volunteer Resource Guide, Finishing the Return, Using TaxSlayer Pro Online, and Deductions tabs Printing the Tax Return Recordkeeping Return Signature Distributing Copies of the Return
Pub 17	<a href="#">Pub 17</a> , Your Federal Income Tax
Pub 730	<a href="#">Pub 730</a> , Important Tax Records
Form 1040-V	<a href="#">Form 1040-V</a> , Payment Voucher

### Optional

Form 8332	<a href="#">Form 8332</a> , Release/Revocation of Release of Claim to Exemption
Form 8879	<a href="#">Form 8879</a> , IRS e-file Signature Authorization

### Recommended Classroom Activities



**Skills  
Workout**



**Certification  
Warm Up**



**Media: Videos  
& Audio**



**TaxSlayer  
Tutorial**



**Job Aids**



**Practice  
Lab**



#### Skills Workout: Link & Learn Taxes Completing the Return

Click Skills Workout to access Link & Learn Taxes Completing the Return.



#### Certification Warm Up – Summary and Exercises

Click Certification Warm Up to access the exercises in Link & Learn Taxes Completing the Return.



#### Media: Video & Audio for Lesson

YouTube video on how to fill out Form W-4

<https://www.youtube.com/watch?v=DFTKTPJHGmQ>



#### TaxSlayer Tips and Resources for Lesson

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TaxSlayer Training Video   [Printing a Return](#)

Practice Lab Tutorial

From the [Practice Lab](#):

1. Enter the universal password (if you do not have the password, you can request it from your site coordinator or SPEC relationship manager).
  2. Sign in to Practice Lab or create an account.
  3. Select the appropriate tutorial.
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#### Job Aids

#### ITA and FAQs for Lesson

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Tax Topics

Form W-4

<https://www.irs.gov/taxtopics/tc753.html>

Recordkeeping

<https://www.irs.gov/taxtopics/tc305.html>

Checklist of Common Errors When Preparing Your Tax Return

<https://www.irs.gov/taxtopics/tc303.html>

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References

References for L&LT Completing the Return

<https://apps.irs.gov/app/vita/content/32/references.jsp>

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## Practice Lab

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Practice Lab

<https://vita.taxslayerpro.com/IRSTraining>

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