

How to use Electronic NTTC Modified Pub 4012

And learn to love it!

■ Why?

- The NTTC Modified Pub 4012 TY18 Rel 1 in PDF format (or “NTTC Pub 4012” for short) is the version that Tax-Aide Counselors are encouraged to use
 - Available electronically
 - Always the current materials
 - Easy to use when you know how

■ Advantages of the NTTC Pub 4012

- NTTC updates/modifications are easily identified in **red (maroon) type**
- The file contains **active page links** (underlined in **blue**) for quick navigation within the document
 - Table of Contents
 - Index
 - Tab O Navigation table

■ Adobe Acrobat Reader DC

- Most popular free software to read electronic .pdf files
- Should be your default software for using .pdf files
- Adobe Acrobat Reader DC should be selected in the settings section of the Control Panel
 - This should be set up on Tax-Aide computers

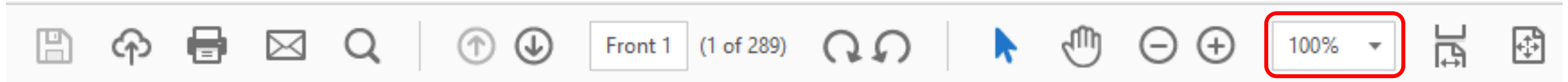
■ Keyboard keys to navigate within the PDF

- The [Home] key takes you to the first page of the document
- [End] key goes to last page of document
- [right arrow] key goes to next page
- [left arrow] key goes to preceding page

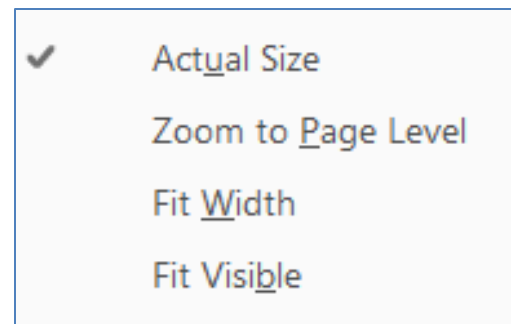
■ Keyboard keys to navigate within the PDF

- [Alt] + [left arrow] goes back to the most recent page viewed
 - Useful as you are navigating Index, Tab O etc.
 - For example, this is very handy if you have clicked to go to a page from the index, and want to go back to the index to see other entries on the topic

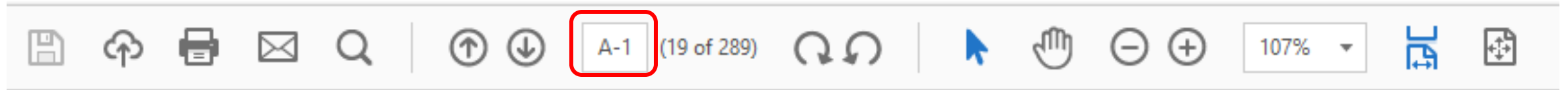
■ Screen Settings for Viewing



- Do you have this toolbar at the top of your screen?
 - If not, Open it by pressing the “F8” key
 - Use the down arrow in the zoom section to choose % zoom, or one of these:

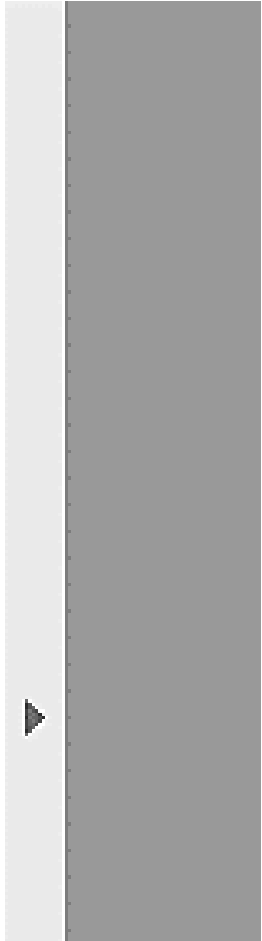


■ Screen Settings for Viewing



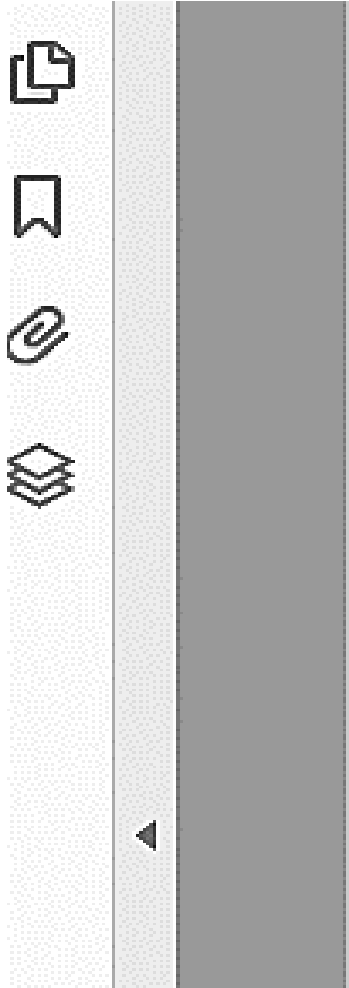
- Type the page number in the page number field in your menu bar (in example above, **A-1** is the page you are on; type **D-45** in that space and click Enter)
 - Case sensitive
 - Type exactly as shown on page

■ Screen Settings for Viewing



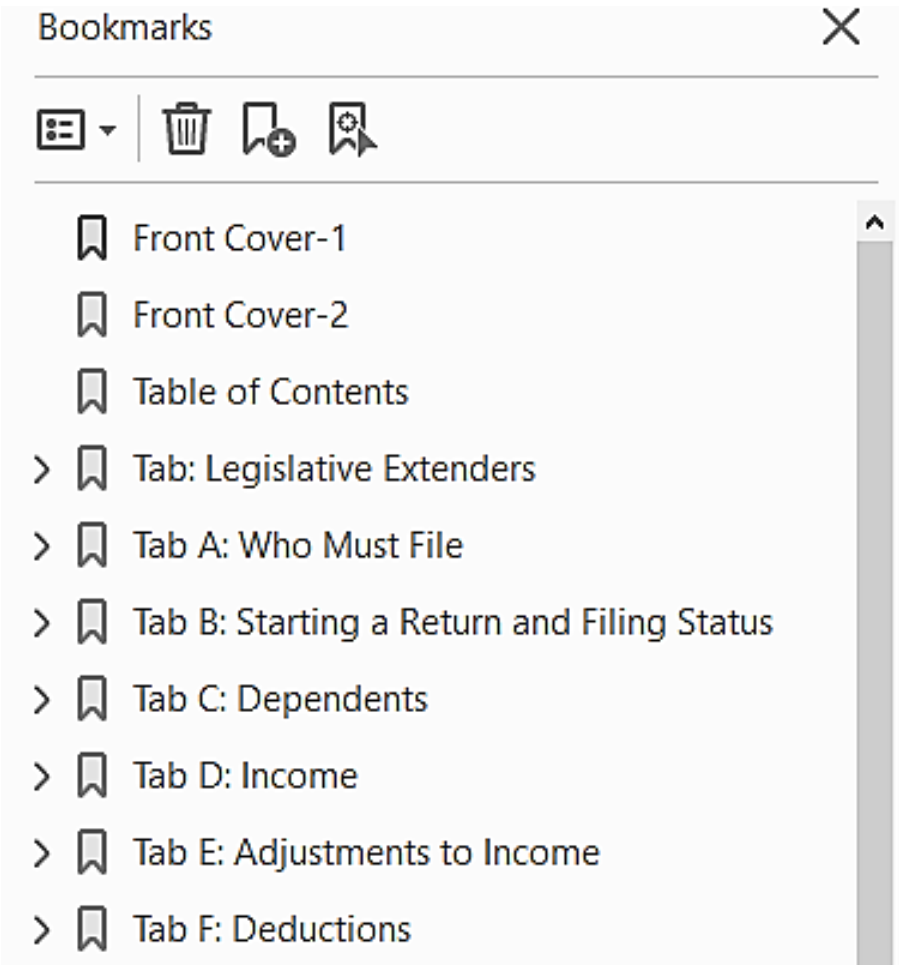
- Click on small right arrow in gray bar on left of screen to open shortcut tools (if it's already pointing left, you are set for next step)
- There is an arrow on the right side also
 - That menu you will not normally use
 - Contains tools which are not free

■ Screen Settings for Viewing



- Top Icon reveals thumbnails of each page
- Second Icon reveals bookmarks in the documents
- Paper clip would show any attachments
- Only top two are used

■ Bookmarks



- > next to bookmark indicate subheadings
- Click on it to see the subheadings
- Click on headings to go directly to the content
- Click on the “X” to close

■ IRS Pub 4012 versus NTTC Pub 4012

Links

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[Tab O Navigation](#) [0-1099O](#) [1099Q-Cha](#) [Chi-F](#) [G-K](#)

[L-P](#) [Q-Royal](#) [RRB-S](#) [T-Z](#)

[Index](#) [A](#) [B-Cr](#) [Cr-Ed](#) [EIC-F](#) [F-H](#) [Ho-I](#) [Iti-N](#) [O-R](#) [R-Se](#) [Sh-U](#) [V-Z](#)

December 1, 2018

Early Preliminary NTTC Edition

Starts with irs.gov version posted
10/11/2018 and includes NTTC
modifications for Tax-Aide volunteers.

Tip

To return to the
most recent
page, hold Alt
and press the
left arrow key.



4012

- Links to key search tools are here
- Click on a blue underlined term to go to that page of the document

■ IRS Pub 4012 versus NTTC Pub 4012

- Table of Contents and Bookmarks are useful
- There are better tools to use in the electronic version
 - Index
 - Tab O Tables

■ Tab O in NTTC Pub 4012

- What you need to navigate to a specific data entry screen in Tax Slayer
- Shows key word to search within TaxSlayer
- Indicates where entries will show up on the new Form 1040 and new Schedules

■ Tab O in NTTC Pub 4012

■ To get to Tab O:

- Press the “Home” key to get to Cover page
- Use links for Tab O Navigation

Links

Table of Contents	1-Tab F	Tabs G-P	Tab Q-end								
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	L-P	Q-Royal	RRB-S	T-Z							
Index	A	B-Cr	Cr-Ed	EIC-F	F-H	Ho-I	Iti-N	O-R	R-Se	Sh-U	V-Z

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■ Tab O in NTTC Pub 4012

- Click [Chi-F](#) to go here (page O-8)

Navigating TaxSlayer and Finding on the New Form 1040

Form or Topic	KeyWord	1040 Line	Navigation to Data Entry Screen	4012
Child and Dependent Care Expenses	24 or 2441	12(S3-49)	Deductions>Credits>Child and Dependent Care Credit	G-5
Child Tax Credit	N/A	17	Completed automatically if Dependent Section properly completed	G-12
Conversion of Trad IRA to Roth IRA	-R, 8606	4	Deductions> Adjustments> Nondeductible IRAs	D-36
Credit for Other Dependents	N/A	17	Completed automatically if Dependent Section properly completed	G-14/16
Credit for the Elderly or Disabled	ELD	12(S3-54)	Deduction>Credits>Credit for the Elderly or Disabled	G-17
CSA 1099-R Civil Service Annuity Paid	-R	4	Income>IRA/Pension Distributions>Add or Edit a 1099-R	D-34

■ Tab O in NTTC Pub 4012

Forms and topics are listed alphabetically in left column

Navigating TaxSlayer and Finding on the New Form 1040

Form or Topic	KeyWord	1040 Line	Navigation to Data Entry Screen	4012
Child and Dependent Care Expenses	24 or 2441	12(S3-49)	Deductions>Credits>Child and Dependent Care Credit	<u>G-5</u>
Child Tax Credit	N/A	17	Completed automatically if Dependent Section properly completed	<u>G-12</u>
Conversion of Trad IRA to Roth IRA	-R, 8606	4	Deductions> Adjustments> Nondeductible IRAs	<u>D-36</u>
Credit for Other Dependents	N/A	17	Completed automatically if Dependent Section properly completed	G-14/16
Credit for the Elderly or Disabled	ELD	12(S3-54)	Deduction>Credits>Credit for the Elderly or Disabled	<u>G-17</u>
CSA 1099-R Civil Service Annuity Paid	-R	4	Income>IRA/Pension Distributions>Add or Edit a 1099-R	<u>D-34</u>

■ Tab O in NTTC Pub 4012

Keyword(s) for searching TaxSlayer in second column

Navigating TaxSlayer and Finding on the New Form 1040

Form or Topic	KeyWord	1040 Line	Navigation to Data Entry Screen	4012
Child and Dependent Care Expenses	24 or 2441	12(S3-49)	Deductions>Credits>Child and Dependent Care Credit	<u>G-5</u>
Child Tax Credit	N/A	17	Completed automatically if Dependent Section properly completed	<u>G-12</u>
Conversion of Trad IRA to Roth IRA	-R, 8606	4	Deductions> Adjustments> Nondeductible IRAs	<u>D-36</u>
Credit for Other Dependents	N/A	17	Completed automatically if Dependent Section properly completed	G- <u>14/16</u>
Credit for the Elderly or Disabled	ELD	12(S3-54)	Deduction>Credits>Credit for the Elderly or Disabled	<u>G-17</u>
CSA 1099-R Civil Service Annuity Paid	-R	4	Income>IRA/Pension Distributions>Add or Edit a 1099-R	<u>D-34</u>

■ Tab O in NTTC Pub 4012

Line location on new Forms 1040 in third column

- “12” means line 12 on the 1040
- “S3–49” means Schedule 3, line 49

Navigating TaxSlayer and Finding on the New Form 1040

Form or Topic	KeyWord	1040 Line	Navigation to Data Entry Screen	4012
Child and Dependent Care Expenses	24 or 2441	12(S3-49)	Deductions>Credits>Child and Dependent Care Credit	<u>G-5</u>
Child Tax Credit	N/A	17	Completed automatically if Dependent Section properly completed	<u>G-12</u>
Conversion of Trad IRA	-R, 8606	4	Deductions> Adjustments> Nondeductible IRAs	D-36

■ Tab O in NTTC Pub 4012

Navigation Commands to TaxSlayer entry screen is in 4th column

Navigating TaxSlayer and Finding on the New Form 1040

Form or Topic	KeyWord	1040 Line	Navigation to Data Entry Screen	4012
Child and Dependent Care Expenses	24 or 2441	12(S3-49)	Deductions>Credits>Child and Dependent Care Credit	<u>G-5</u>
Child Tax Credit	N/A	17	Completed automatically if Dependent Section properly completed	<u>G-12</u>
Conversion of Trad IRA	-R. 8606	4	Deductions> Adjustments> Nondeductible IRAs	D-36

■ Tab O in NTTC Pub 4012

Navigation to link to Pub 4012 Page in last column

Navigating TaxSlayer and Finding on the New Form 1040

Form or Topic	KeyWord	1040 Line	Navigation to Data Entry Screen	4012
Child and Dependent Care Expenses	24 or 2441	12(S3-49)	Deductions>Credits>Child and Dependent Care Credit	<u>G-5</u>
Child Tax Credit	N/A	17	Completed automatically if Dependent Section properly completed	<u>G-12</u>
Conversion of Trad IRA	-R. 8606	4	Deductions> Adjustments> Nondeductible IRAs	D-36

- Click the link to go directly to that page

■ The Index in NTTC Pub 4012

- To get to the Index:
 - Click [Home] to get to Cover page
 - Use links for Index

Links

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■ The Index in NTTC Pub 4012

Long-term care insurance
benefits received, [D-49](#)
as itemized deduction, [F-6](#)
as qualified expense for HSA distribution, [E-7](#)
[Lump-sum Social Security distributions, D-42](#)

- Click on the underlined page number, [D-42](#), and you will go to the page that discusses entry of lump-sum Social Security distributions

■ The Index in NTTC Pub 4012

Social Security

Canadian or German, [D-41](#)

in determining support, [C-7](#)

excess withholding of, [H-32.1](#)

[lump-sum distributions, D-42](#)

mySocial Security account, [B-10](#), [P-7](#)

TaxSlayer entry, [D-41](#)

- You can also find lump-sum Social Security here
- Many terms are “double-posted” for convenience



■ The Index in NTTC Pub 4012

- Some topics use “See” entries, since you may look them up in several ways
 - Business income/expenses. See Schedule C
- Note that the blue underline under Schedule C indicates a link
- Clicking on it will take you to the index page containing the main **Schedule C** entry, where there are multiple sub-entries to help find the topic you want

■ NTTC Modifications

- The NTTC Pub 4012 shows important NTTC modifications
 - On all pages note the text in **red (maroon)** (color depends on your screen) added in several places.
 - This indicates NTTC modifications
 - **Will NOT appear in the printed IRS Pub 4012 unless you have done all the delete/replace corrections**
 - Corrections would be black, not red

■ Switching from Pub 4012 to TaxSlayer, and back

- Another issue for some counselors is learning how to use a PDF document while they have TaxSlayer open
 - The simplest way is to use the icons in the taskbar to switch between the two applications.
 - Keep the 4012 open
 - Note the PDF icon in your taskbar 
 - Minimize by clicking on “—” in upper right corner 

■ IRS Pub 4012 versus NTTC Pub 4012

■ Why you shouldn't use the printed IRS version

Capital Gains	CAP	Income>Capital Gains and Losses
Capital Gains Distributions	INT or DIV	Income>Interest or Dividend Income>Interest or Dividend Income>Dividend Income>Capital Gain to Schedule D
Capital Loss Carryforward	CAP	Income>Capital Gains and Losses>Other Capital Gains Data (including Capital Loss Carryover)

IRS

Pg O-7

Capital Gains	CAP	6(S1-13)	Income>Capital Gains and Losses	D-21
Capital Gains Distributions	INT or DIV	6(S1-13)	Income>Interest or Dividend Income>Interest or Dividend Income>Dividend Income>Capital Gain to Schedule D	D-11
Capital Loss Carryover	CAP	6(S1-13)	Income>Capital Gains and Losses>Other Capital Gains Data (including Capital Loss Carryover)	D-20

NTTC

Pg O-7

■ IRS Pub 4012 versus NTTC Pub 4012

- Tab O Tables – two extra columns:
 - Form 1040 locator (third column)
 - Link to 4012 page (last column)

■ IRS Pub 4012 versus NTTC Pub 4012

- Enhanced Indexing (with Links)
- Compare the listings for “Dependents”

- IRS Version


Dependent 6, Ext-6, A-1, A-2, A-3, B-7, B-14, B-15, C-1, C-2, C-3, C-4, C-7, D-1, D-2, D-33, D-37, E-6, E-10, F-1, F-2, F-3, G-5, G-6, G-7, G-8, G-12, G-13, G-15, H-4, H-11, H-15, I-1, I-2, I-4, J-3, J-4, J-8, L-2, L-3, M-2, M-5, N-3, N-4, N-5, N-6, O-7, P-2, P-5, P-7, Q-2, Q-3, Q-4, Q-5

■ NTTC Linked Entries

Dependent/qualifying person
 for child and dependent care credit, [G-5](#)
 child of divorced or separated parents, [C-6](#), [G-14](#)
 claiming education credits for, [J-5](#), [J-9](#)
 credit for, if not qualified for child tax credit,
[G-14 to G-16](#)
 definition, [Q-4](#)
 filing requirements, [A-2](#), [H-11](#)
 for head of household, [B-7](#)
 modified AGI, [H-11](#), [H-12](#)
 Qualifying Child. See [Qualifying Child](#)
 qualifying relative, [C-1](#), [C-4 to C-5](#)
 rules for claiming, [C-1](#)
 support determination, [C-7](#)
 TaxSlayer entry, [B-14 to B-15](#)
 unclaimed, [H-7](#), [H-18.3](#)

■ IRS Pub 4012 versus NTTC Pub 4012

- Which one do you think will
 - Give you more of the information you need
 - Meet all Tax-Aide Policies and Scope
 - Allow you to find it quicker
 - *Easier to carry to your site*
 - *Take less space in your work station*



Much of this
applies to other
pdf documents
too!

■ Are you convinced yet???

Questions...



Comments...

