



Financial Education Program

Course Outline

Welcome

Module 1: Understanding your rights

- Module 1 Introduction and outline
- Your rights as a taxpayer
- Your rights regarding tax preparers
- Your rights to challenge Department decisions
- Your privacy and confidentiality
- Module 1 resources and certificate

Module 2: Filing responsibilities

- Module 2: Introduction and outline
- Personal income tax
- Sales and use tax
- Property tax
- Other taxes and fees
- Module 2 resources and certificate

Module 3: Self-employment resources

- Module 3: Introduction and outline
- Are you self-employed?
- Recordkeeping
- Supporting documentation
- What if you have employees?
- Using separate accounts
- Estimated taxes
- Income tax considerations
- Module 3 resources and certificate

Module 4: How tax credits can help you

- Module 4: Introduction and outline
- How tax credits and deductions work
- Credits for New York residents
- Earned income credits
- Credits related to children
- Credits related to elder care
- Credits related to home or farm ownership
- Other common credits
- Credits summary
- Module 4 resources and certificate

Module 5: Filing your return and free filing resources

- Module 5: Introduction and outline
- Who must file
- General filing information
- Information you need to file
- How a return works
- Free filing resources
- Module 5: resources and certificate

Module 6:

- Module 6: Introduction and outline
- Questions to ask your preparer
- Additional considerations when hiring a tax preparer
- Tax professional authorizations
- Have a problem with your preparer?
- Module 6: resources and certificate

Module 7:

- Module 7: Introduction and outline
- Refund information
- What if you owe money?
- Responding to department notices
- Using the Tax Department website
- Tax information for specific interests
- Module 7: resources and certificate

Course completion and feedback