# Tax Associate Passport

Welcome to H&R Block and to your TS25 Client Care training for Tax Associates! To kick off your training journey, you will start with a Warm Welcome meeting hosted by your District General Manager (DGM) between November 15 and November 30. During this session, your local District General Manager (DGM) will walk you through what your training will entail and the timelines. After attending this session, you will be ready to begin your self-study sessions.

This passport is your guide to track your progress and see what you need to complete before moving on to the next course. Our training software will guide you step-by-step, but this serves as a guide you can use to track your progress. Throughout your paid training, you will take self-study courses and then attend a lab where you can practice hands-on application of the material you covered in your self-study.

Your deadline for completing these courses is December 31, 2024. Once you are in the office, you will move on to your hands-on training, titled ***Your First 30 Days***, and a 20-hour tax course titled ***Tax Core Concepts***.

> Please note, you must complete each course before the next course appears in your assigned courses in Inkling. Once you finish a course, the next course will be assigned to you.

| Welcome to H&R Block | | |
|---|---|---|
| **Course** | **Method** | **Time** |
| DGM Warm Welcome Kick Off meeting | In person | 60 |
| Welcome to TS25 | Self-study | 5 |
| New Field Associate Onboarding | Self-study | 30 |
| Your First Day in the Office: A Virtual Tour | Self-study | 45 |
| Microsoft Applications: Overview | Self-study | 2 |
| Microsoft Applications: How to Find These Tools | Self-study | 4 |
| Microsoft Applications: When to Use These Tools | Self-study | 4 |

***** Required compliance courses will be assigned to you based on state requirements. These courses are in Block Academy under My Transcript *****

# Tax Associate Passport

| TS25 Tax Associate Core Curriculum | | |
|---|---|---|
| Course | Method | Time |
| Welcome to Client Care Training | Self-study | 5 |
| Client Experience Service Standards | | |
| Before Service | Self-study | 10 |
| During Service | Self-study | 10 |
| After Service | Self-study | 10 |
| When a Client Goes on Hold | Self-study | 10 |
| Experience for New Clients | Self-study | 60 |
| Hot Tax Topics | Self-study | 120 |
| Field Technical Support | Self-study | 10 |
| Tax Associate Compensation | Self-study | 10 |

| System Training | | |
|---|---|---|
| Course | Method | Time |
| Appointment Manager | | |
| Introduction | Self-study | 10 |
| Seeing Your Schedule | Self-study | 10 |
| Making an Appointment | Self-study | 10 |
| Work Center | | |
| Introduction | Self-study | 10 |
| My Dashboard | Self-study | 10 |
| Client's Dashboard | Self-study | 10 |
| Campaigns and Messages Dashboard | Self-study | 10 |
| Quick Links and How to Start a Return | Self-study | 10 |
| Additional Resources and Walkthrough | Self-study | 10 |

***** Required compliance courses will be assigned to you based on state requirements. These courses are in Block Academy under My Transcript *****

# Tax Associate Passport

| Before Service | | |
|---|---|---|
| **Course** | **Method** | **Time** |
| Client Service Options | Self-study | 10 |
| Introduction to Softphones | Self-study | 10 |
| Answering the Phones | Self-study | 10 |
| Client Matching | Self-study | 10 |
| Service Level Agreements | Self-study | 10 |
| Capturing Client Expectations | Self-study | 10 |
| Secure Digital Documents | Self-study | 10 |
| Capturing Client Documents | Self-study | 10 |
| Calling Campaigns | Self-study | 10 |
| Capture Client Messages | Self-study | 10 |
| Capacity to Serve | Self-study | 10 |
| Increase Capacity with Fulfillment Network | Self-study | 10 |
| Confirming Appointments | Self-study | 10 |
| ***Getting Prepared Lab*** | ***VILT*** | ***90*** |

| During Service | | |
|---|---|---|
| **Course** | **Method** | **Time** |
| BlockWorks Online Training for Tax Professionals (Filing Season 2024) | Self-study | 180 |
| Tax Interviewing Part 1 | | |
| Elements of Successful Tax Interview | Self-study | 10 |
| Setting Expectations | Self-study | 10 |
| Maintaining Engagement | Self-study | 10 |
| Client Experience Moments | | |
| Client Experience Moments | Self-study | 2 |
| Client Experience Moments Video Walkthrough | Self-study | 9 |
| Client Experience Moments Job Aid | Self-study | 2 |
| Using the Client Experience Monitor to View and Sign Documents | Self-study | 2 |
| Upfront Transparent Pricing | Self-study | 10 |
| MyBlock | Self-study | 10 |
| Client Consents | Self-study | 10 |
| Tax Interviewing Part 2 | | |
| Finishing the Return | Self-study | 10 |
| Summary | Self-study | 10 |
| Financial Products | | |

***** Required compliance courses will be assigned to you based on state requirements. These courses are in Block Academy under My Transcript *****

# Tax Associate Passport

| During Service | | |
|---|---|---|
| **Course** | **Method** | **Time** |
| Introduction | Self-study | 10 |
| Peace of Mind | Self-study | 10 |
| Emerald Card | Self-study | 10 |
| Tax Identity Shield | Self-study | 10 |
| Refund Transfer | Self-study | 10 |
| Refund Advance | Self-study | 10 |
| Spruce | Self-study | 10 |
| Offer Refund Options | Self-study | 10 |
| Offer Products as Service Solutions | Self-study | 10 |
| Meaningful Tax Tips | Self-study | 10 |
| Second Look | Self-study | 10 |
| Second Look Follow up | Self-study | 10 |
| Small Business Options | Self-study | 10 |
| Two Year Comparison | Self-study | 10 |
| Demonstrate Value | Self-study | 10 |
| Printing Options | Self-study | 10 |
| Send A Friend | Self-study | 10 |
| Research Tools | Self-study | 10 |
| What is a Hold? | Self-study | 10 |
| Client Expectations with Holds | Self-study | 10 |
| Video Appointments | Self-study | 10 |
| ***Tax Preparation Lab*** | ***VILT*** | ***90*** |

***** Required compliance courses will be assigned to you based on state requirements. These courses are in Block Academy under My Transcript *****

# Tax Associate Passport

| Getting to Paid and After Service | | |
|---|---|---|
| **Course** | **Method** | **Time** |
| Client Communication | Self-study | 10 |
| Reassign the Client | Self-study | 10 |
| Save the Client | Self-study | 10 |
| Set Priority Appointments | Self-study | 10 |
| Client Experience Survey | Self-study | 10 |
| Thank You Messages | Self-study | 10 |
| Detractors | Self-study | 10 |
| Checking E-File Status | Self-study | 10 |
| Small Business Year-Round | Self-study | 10 |
| Prevent Additional Office Trips | Self-study | 10 |
| Year-Round Services | Self-study | 10 |
| ***Wrap Up & Follow Up Lab*** | ***VILT*** | ***60*** |

***** Required compliance courses will be assigned to you based on state requirements. These courses are in Block Academy under My Transcript *****