

TAX SKILLS

Preparing to File Taxes Safely

Detailed practice, calculation, decision-making, and assessment

GRADES 9-12	TIME 2 x 42 min	GROUPING I / pairs / whole	PRODUCT Checklist
YOUR CHALLENGE Organize documents, sequence a careful filing process, catch data-entry errors, recognize scams, and create a secure recordkeeping plan.			

Taxes Connect Paychecks and Annual Filing

Tax filing combines document collection, eligibility decisions, calculations, payment records, and identity protection. Accuracy matters, but so does knowing when information is missing. A careful filer pauses, verifies, and uses official sources or qualified assistance instead of guessing.

Term	Student-friendly meaning
Tax return	Form used to report information and calculate tax results.
Filing status	Category that affects tax calculations and eligibility rules.
Dependent	Person who meets specific tax-law tests to be claimed by another taxpayer.
Direct deposit	Electronic deposit using verified banking information.
Phishing	Fraudulent message designed to steal information or money.
Filing confirmation	Evidence that an electronic return was accepted or submitted.
CLASSROOM USE All people, employers, figures, brackets, and documents in this packet are fictional. Never place a real Social Security number, employer ID, bank number, or tax document in classroom work.	

Part 1 - Build a Fictional Filing Document List

Taylor had a part-time job, bank interest, and education expenses. Decide what each record helps verify.

Record	What it may support	Received?	Follow-up
Form W-2 from employer	Wages and withholding	Yes	
Bank tax statement	Interest income	No	
Education statement/records	Possible education information	Yes	
Prior-year return	Carryover/reference information	Yes	
Government photo ID	Identity verification	Yes	
Bank routing/account proof	Direct deposit choice	No	

Which missing records should Taylor request or retrieve before filing? Why should Taylor avoid sending them through ordinary classroom email?

Part 2 - Put the Filing Process in Order

Create a careful sequence rather than rushing to submit.

Order	Action	Why	Completion evidence
1			
2			
3			
4			
5			
6			
7			

Order these actions: gather records; verify official filing source/preparer; enter data; compare entries with documents; review filing status/dependency questions; review refund/balance and bank data; submit and save confirmation.

Part 3 - Find Errors in a Fictional Draft

Compare the source facts with the draft entries.

Item	Source fact	Draft entry	Correct / investigate
Wages	\$12,800	\$12,080	
Federal withholding	\$620	\$620	
Interest income	\$84	\$0	
Bank account ending	4421	4412	
Name spelling	Taylor Morgan	Tayler Morgan	
Dependency question	Not yet confirmed	Marked No	

Identify every error or unresolved item. Which one could send a refund to the wrong account?
Which requires a family/eligibility check rather than a guess?

Part 4 - Respond to Tax Scam Messages

Do not click, call, or pay. Evaluate each fictional message.

Message	Red flags	Safe response	Evidence to preserve
“IRS refund waiting—click now.”			
“Pay tax debt today with gift cards.”			
“Verify SSN by text or be arrested.”			
Unexpected preparer promises a huge refund.			
Official-looking QR code arrives by email.			

List at least two red flags per message. Explain how to navigate independently to an official site instead of using the message link.

Part 5 - Write a Safe Filing and Recordkeeping Plan

Taylor must finish accurately while protecting personal information.

Final check	My action
All income documents received	
Names/numbers match records	
Filing/dependency questions verified	
Refund/balance reviewed	
Bank data double-checked	
Official site or preparer verified	
Confirmation and return saved securely	
Scam response plan	

Write 150-200 words. Include a stop point: a condition that means Taylor should pause and seek qualified help rather than guess.
