VITA SYLLABUS
SPRING 2016

Instructor: Kathy Hurley
Office: MBEB 3121
Office hours: TTh 12:15-2:15 pm; Wednesday 10:30 – 11:30 am
Office Phone: 208-426-1271; Cell: 208-863-2872 (text or call, please do not share.)
Training site: http://apps.irs.gov/app/vita/
My Free Taxes site: www.myfreetaxes.com
Link and Learn site: www.linklearncertification.com

Wednesday, January 13, 2015 – MBEB, 3rd floor Conference Room
- Please bring a laptop with you if you can.
  □ Introductions
    o Please make sure I have all of your correct phone numbers.
  □ Scheduling
    o Shifts
    o Responsibilities
    o Photographer
    o Media
    o Poster for Service Learning
  □ Discussion Board – observations, hints to pass on, “what you learned”
  □ Volunteer requirements
    o “Professional” dress
  □ Progress check/How far have you gone in the training?
  □ Handout materials
  □ Review VITA Scope of Service
  □ Discuss certification exams
  □ Review client documentation requirements
  □ Review ACA section
  □ Review Filing Status and Exemptions section

Wednesday, January 20, 2015 – MBEB, 3rd floor Conference Room
- Please bring a laptop with you if you can.
  □ Review remaining sections
  □ Go over quality site requirements
  □ Discuss what I need as you pass certification exams.

Wednesday, January 27, 2015 – 2:30 – 4:00 pm Boise Public Library Auditorium
□ Certification exams taken by today Determine how we are going to set up the auditorium
□ Set up computers and test them; then take down
□ Review tax concepts, program questions, policies and procedures
□ Practice interviewing each other using H&R Block software (www.myfreetaxes.com)
□ Confirm schedules and responsibilities
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Friday, January 22, 2015 –
➢ Pass certification exam and electronically signed Form 13615, save as a pdf and email to Kathy by today!! I need to submit information to IRS.

Wednesday, February 3 through April 14, 2015, except for March 23 – Boise Public Library Auditorium (February 3 – site closes at 2:30, must be out at 3!)
□ Noon – 1st shift: Set up site, make sure we are ready for clients
□ 12:30 Site opens
□ 2:00 pm - 2nd shift
□ 4:00 pm – Site closes
□ Take-down site

Wednesday, April 20, 2015 – MBEB, 3rd floor Conference Room
□ Debrief
➢ Create poster for SL Poster Session

Wednesday, April 28, 2015 – NO CLASS email the following to Kathy by 5 pm
➢ 1-2 page reflection paper covering
   o Your experience, insights you gained from the VITA experience
   o Suggestions for improvement
   o What went well

Requirements to earn an A:
□ Pass Advanced Certification Exam
□ Pass one Specialty Exam before February 17, 2015
□ 95% participation and attendance for a minimum of 2 hours each week
   o If cannot be at a VITA session, contact Kathy in advance to arrange “make-up” work.
   o Absence not approved in advance will result in a lower grade.
□ Professional behavior and dress at all VITA sessions
□ Demonstrate and apply knowledge of tax code
□ Actions reflect understanding of Quality Site Requirements and high ethical standards
□ Recognize limitations of personal knowledge and ask for assistance when appropriate
□ Well-written reflection paper
□ Be a team player at all times with a positive attitude towards your classmates and our clients
□ GRADUATE STUDENTS Additional Requirements
   o Provide research assistance to undergraduate students
   o Become an “expert” on one aspect of VITA tax preparation
     (We will figure out which section.)
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Requirements to earn a B:

☐ Pass Advanced Certification Exam only
☐ 85% (miss more than 2 sessions) attendance or fewer than 2 hours each week
  ☐ Absence(s) without prior notification for anything less than an emergency will affect your grade
☐ Professional behavior and dress at all VITA sessions
☐ Adherence to Quality Site Requirements and ethical standards
☐ Demonstrate a lack of understanding of when to ask for assistance regarding application of the tax code
☐ Reflection paper has grammatical errors or does not address the questions

Actions that could result in a grade lower than a B:

☐ Pass only the Basic Certification exam
☐ Attendance at fewer than 10 Wednesday sessions or consistently late or spend less than two hours on-site.
  ☐ Frequent absences without prior notification
☐ Inconsistent adherence to quality site requirements (need to be reminded by a fellow student or instructor) and ethical standards
☐ Demonstrate a lack of understanding of when to ask for assistance regarding application of the tax code
☐ Demonstrate lack of knowledge of tax code
☐ Do not turn in Reflection Paper
☐ Do not participate in creating poster for Service Learning Poster Session and/or do not present poster at Poster Session

Actions that could result in dismissal and a failing grade:

☐ Do not adhere to Quality Site Requirements
☐ Unethical behavior or standards
☐ Attendance below 50% of required sessions or hours.