Instructor: Kathy Hurley
Office: MBEB 3121
Office hours: Monday 9-10:30 am, 12:30 – 1:30 pm; Thursday 1:30 – 3:00 pm or by appointment.
Office Phone: 208-426-1271
Training site: http://apps.irs.gov/app/vita/
My Free Taxes site: www.myfreetaxes.com
Link and Learn site: www.linklearncertification.com

Wednesday, January 10, 2018 – MBEB, 3rd floor Conference Room
- Please bring a laptop with you if you can.
  - Introductions
    - Please make sure I have all of your correct phone numbers.
  - Scheduling
    - Shifts
    - Responsibilities
    - Photographer
    - Media
    - Poster for Service Learning
    - Refugee Day – TBD
  - Discussion Board – observations, hints to pass on, “what you learned”
  - Class requirements
  - “Professional” dress
  - Handout materials
  - Progress check/How far have you gone in the training?
  - Discuss certification exams
  - Discuss what I need as you pass certification exams
  - Review resources

Wednesday, January 17, 2018 – MBEB, 3rd floor Conference Room
- Please bring a laptop with you if you can.
  - Review remaining sections/ sections you have questions on
  - Review VITA Scope of Service
  - Review client documentation requirements
  - Review ACA section and Tax Updates
  - Go over quality site requirements
    - Intake form
    - Specialty certifications (need two people to pass each for each time slot)

Wednesday, January 24, 2018 – MBEB, 3rd floor Conference Room
- Please bring a laptop with you if you can.
  - Discuss logistics and anything else we need to take care of
  - Work on specialty certifications
Wednesday, January 31, 2018 – Time TBD – most likely at the Boise Public Library Auditorium – I need to confirm

- Certification exams need to be 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

➢ Pass Advanced certification and one specialty exam BY TODAY.
  - Electronically signed Form 13615, save as a pdf and emailed to Kathy!! I need to submit information to IRS.

Wednesday, February 7 through April 11, 2018, except for March 28 – Boise Public Library Auditorium

- 11:45 – 1st shift: Set up site, make sure we are ready for clients
- 12:15 Site opens
- 2:00 pm - 2nd shift
- 4:00 pm – Site closes
- Take-down site

Wednesday, April 18, 2018 – MBEB, 3rd floor Conference Room

- Debrief
  - Create poster for SL Poster Session if not already done

Wednesday, April 25, 2017 – NO CLASS email the following to Kathy by 5 pm

➢ 1-2 page reflection paper covering
  - Your experience, insights you gained from the VITA experience
  - Suggestions for improvement
  - What went well

Requirements to earn an A:

- Pass Advanced Certification Exam by January 31, 2018
- Pass one Specialty Exam before February 7, 2018
- 95% participation and attendance for a minimum of 2 hours each week
  - If you cannot be at a VITA session, contact Kathy in advance to arrange “make-up” work.
  - 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
VITA SYLLABUS
SPRING 2018

☐ 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 Pass TWO Specialty Exams
  o Become an “expert” on one aspect of VITA tax preparation
    (We will figure out which section.)

Requirements to earn a B:
☐ Pass Advanced Certification Exam only
☐ 85% (miss more than 2 sessions) attendance or fewer than 2 hours each week
  o 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.
  o 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.