VITA SYLLABUS
SPRING 2017

Instructor: Kathy Hurley
Office: MEBB 3121
Office hours: TTh noon – 1:30 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 11, 2017 – MEBB, 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
    o Refugee Day – February 25, 2017
  □ 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 18, 2017 – MEBB, 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 25, 2017 – 2:30 – most likely at the Boise Public Library Auditorium – I need to confirm
  □ 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
Friday, January 27, 2017 –
- **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 1 through April 12, 2017, except for March 22 – Boise Public Library Auditorium
- **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 19, 2017 – MBEB, 3rd floor Conference Room
- **Debrief**
- Create poster for SL Poster Session if not already done

Wednesday, April 26, 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 25, 2017**
- **Pass one Specialty Exam before February 15, 2017**
- **95% participation and attendance for a minimum of 2 hours each week**
  - If 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**
- **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**
  - Provide research assistance to undergraduate students
  - Become an “expert” on one aspect of VITA tax preparation
    (We will figure out which section.)

Requirements to earn a B:
VITA SYLLABUS
SPRING 2017

☐ 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.