

**ACC 366P/384 – Accounting Practicum  
Federal Taxation of Low Income Filers: Socio-Economic Forces**

**Unique #02720/02905 Tuesday 3:30 - 5:30, UTC 3.122**

**Spring 2014 Syllabus**

**Instructor:** Doug deVidal  
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**Office:** GSB 5.126B  
**Office Phone:** 512.471.7893  
**Office Hours:** Tuesday and Wednesday from 2 - 3 and by appointment.  
E-mail questions are also encouraged. If you cannot attend the above office hours, please feel free to set-up (via e-mail) an office appointment at another time.

Volunteer service period: January 20 - April 15, 2014

Volunteer sites and operating hours are self-selected and may vary. Sites ([www.communitytaxcenters.org](http://www.communitytaxcenters.org)) are on major bus routes and students may wish to coordinate carpooling.

**Practicum Description**

This course integrates community service and academic learning as follows:

- **Community service** involves at least 55 volunteer hours working with Community Tax Centers, a Foundation Communities' (<http://www.foundcom.org>) program that partners with the IRS to implement the Volunteer Income Tax Assistance (VITA) program for low income filers. Last year, Community Tax Centers helped over 18,000 people and brought over \$30,000,000 into the Austin economy in the form of tax refunds and credits. This year we hope to increase those totals! This effort will require over 650 volunteers from UT and the greater Austin area.

***PLEASE RECALL, IN THE COMMUNITY YOU'RE THE FACE OF THE  
UNIVERSITY OF TEXAS AT AUSTIN - DO US ALL PROUD!***

- **Academic learning** comprises a multi-disciplinary curriculum addressing socio-economic issues facing members of the low-income community. Topics will be presented by experts in fields such as low-income housing, immigration, public policy, economic development, behind the scenes at the IRS, and volunteering in the community. In addition, training and certification to perform this community service activity will be provided.

McCombs students at all levels are eligible - BBA students, MPA students, and MBA students. No accounting or tax background is necessary.

### Community Service Requirements

For community service credit toward course credit, participants must complete the following community service activities.

- Register with Community Tax Centers as a volunteer.
- Complete 8-hours of basic IRS training and 4 hours of advanced IRS training offered through Community Tax Centers that covers tax law principles and how to use TaxWise software.
- Become certified as a tax preparer by passing both the basic and advanced IRS certification tests at <https://www.linklearncertification.com/d/>  
Your user name to take the tests needs to be “last-name.first-name”  
Each exam certificate is due at the beginning of your class in the week after you finish each of the training levels. **This component is 11% of your course grade.**
- Self-select volunteer hours on Community Tax Center’s web-based scheduler.
- Perform at least 55 hours of volunteer work as a tax preparer.

### Classroom Procedures

**Classroom protocol.** The general in-class model is as follows:

- The first 45 minutes of class-time we will have team meetings (Locations will be announced at a later date.)
- The remainder of our class-time will be with guest speakers

However, this model is contingent on the guest speakers’ preferences, so it may vary.

**Teams and team leaders.** The instructor will divide ACC 366P students into teams. Each team will be led by two or three graduate students. Team leaders will play a primary role in your in-class involvement and in your evaluation. Likewise, you will evaluate your team leaders. Team leaders are like a job manager and carry substantial responsibility. In addition to orchestrating your team meetings and activities and evaluating you, they are your first source for inquiries and for feedback concerning in-class activities.

**Guest speakers.** The in-class segment of the practicum is almost exclusively a guest speaker series. Ample accounting content arises in the volunteer component. Hence the academic segment strives to put your experience in a broader context by discussing issues associated with the low-income community in the U.S. Distinguished guest speakers place an extra responsibility on us and also introduce some special considerations, including the following.

- Courtesy and attentiveness toward our guests is essential. *We are representing the University of Texas by our professionalism, involvement, politeness, punctuality, and all other aspects of our comportment!*
- Speaker characteristics may vary, including differing styles, abilities to engage, length of talks, depth of content, and the like. This is just one aspect of the pervasive diversity you will experience in this practicum and one over which there is limited control. In the end, it is everyone’s responsibility to make this practicum a meaningful experience.
- There is a **no laptop policy** during guest speakers.

**Communications and e-mail on Blackboard:** The use of e-mail and blackboard is **required** for this course. When sending class-wide e-mails, I will use the e-mail addresses that are supplied to me on Blackboard. If this is not your preferred email address, be sure you set it up for forwarding. Any outside-of-class announcements that I make (e.g., syllabus changes, assignment changes, etc.) will be sent to you via e-mail. It is possible that substantial content will be posted on Blackboard or sent via e-mail. It is your responsibility to regularly check your e-mail and the class Blackboard site.

### Undergraduate Evaluation

A “**B-F**” course grade will be earned depending on the quality of performance in the items below.

	<b>Percentage of total grade</b>
Community Tax Center site manager evaluations	12%
Completing all IRS certification tests on time	11%
Daily Grades	12%
Speaker write-ups	11%
Completing Volunteer Hours	12%
Significant Impressions paper and discussion	11%
Instructor’s discretionary evaluation	<u>16%</u>
Total	<u>85%</u>

A grade of “**B+**”, “**A-**”, or “**A**” may be earned in the course with the completion of a high quality, rigorous thesis paper for students with a letter grade of B in the course activities indicated above. See the section of this syllabus titled “Thesis Paper” for more information about the thesis paper. Evaluation input will be provided to the extent possible. However, definitive assessment of your grade will not be available when the optional thesis paper is due. **Hence, students assume some grade risk in deciding to write the thesis paper.**

***Community Tax Center (CTC) site manager evaluations.*** Site managers will provide input to the instructor regarding

- Quality of work, attitude, professionalism, and punctuality (talking on cell phones is **NOT PERMITTED AT ANY TIME** when in the tax centers)
- Effectiveness of CTC client interface and comportment (this includes the dress code below)
- Quality of interaction with site colleagues, and did you bring the proper materials with you
- Proper dress - When you are at the Community Tax Center sites, you are not only representing the University of Texas and Foundation Communities, you will also be providing a customer service. Please dress appropriately when you show up to volunteer. Acceptable dress consists of business casual, jeans, and UT t-shirts. The following items are **NOT** acceptable: shorts, workout clothes, hats, leggings as pants, pajamas, and flip-flops. (This is necessarily **NOT** a complete list.)

***Daily Grades.*** Your team leaders will evaluate your team participation during group meetings based on the following scale: (Do not use half points)

- 3 = excellent
- 2 = satisfactory
- 1 = unsatisfactory
- 0 = absent, partially absent, or unprofessional

In order to earn all 12 points of this grade component, your daily grade average must be 2.0 or higher.

Your evaluation will be based on the following criteria, which by their nature, contain elements of subjectivity.

- The quality and quantity of your contributions in your group meetings
- The quality and quantity of your contributions in any group emails or other communication mechanism your leaders decide to use
- Your willingness and effectiveness to articulate questions during the speakers' sessions
- Your attendance in and punctuality to class, whether it begins with your group meeting or the speaker's presentation
- Your comportment with guests and participants
- Other subjective criteria the group leaders see fit

**GRADUATE STUDENTS.** *At the end of each class, you are asked to evaluate each team member's overall contribution to your team. Please assess students on a numeric scale of 0-3 as stated above. I anticipate the vast majority to be scores of 2, with only obvious outliers being 0, 1, or 3. (Do not assign half points.) Under only extreme circumstances should more than one member of your group get a "3" in a given week. The only time I realistically expect to see more than one "3" in a week is if there were multiple members of your team who asked the guest speaker a "good" question. Every "3" that is given must be accompanied by an explanation of why that student earned a "3". While you have some latitude in determining and implementing evaluation criteria, it is necessary that there be significant commonality in evaluation criteria so there is a perceived and actual level playing field across teams for determining grades. In your first meeting, I recommend that you reiterate to your team members:*

- The contribution evaluation criteria (above), and
- How and to whom to communicate the necessary inputs (e.g., speaker write-ups)

*All team leaders of the group must get together and assign one grade for the day for each undergraduate team member. I only want one overall grade turned into me. Each undergraduate's daily grade is due to me via e-mail by 11:59 PM on Tuesday. I highly recommend meeting right after class and determining these grades. You need to keep these grades in your own semester gradebook.*

*By 11:59 PM on Tuesday, team leaders should provide confidential feedback (via e-mail) to each team member so he or she knows his or her performance and can adjust as desired.*

*We will sit in our groups during the guest speaker presentations. If an undergraduate student asks the guest speaker a "good" question, please consider giving them a Daily Grade of "3". If an undergraduate student is sleeping, laying their head down, texting, talking, not paying attention, or acting unprofessional in anyway during the guest speaker presentation please give them a Daily Grade of "0". If you fail to catch and punish unprofessional behavior, it will affect your grade.*

**Speaker write-ups.** On the Monday before each class, you are to submit at least a 250 word write-up of the current week's speaker's topic. Your write-up will be rated by your team leaders. The same 0-3 scale will be used: (Do not use half points)

- 3 = excellent
- 2 = satisfactory
- 1 = unsatisfactory
- 0 = not turned in or turned in late

To earn a grade of "3", your speaker write-up must be of high quality and at least 500 words.

In order to earn all 11 points for this component of your grade, your speaker write-up average must be 2.0 or higher.

Factors that might play into the rating of each speaker write-up might include, but are not limited to, the following:

- Topicality
- Interest
- Clarity of expression
- Relevance to the topic
- The quality and quantity of relevant underlying research (include reference sources)

All speaker write-ups **MUST** be e-mailed to your group leaders in a Word document. (Group leaders – Word counts the number of words in the document for you, thus there is no need to manually count yourself.) Speaker write-ups in any other form (e.g., hand-written, etc.) will not be accepted.

Your speaker write-up is due to your team leaders by 11:59 PM on Monday before the Tuesday class.

Please note that copying material from a website for your speaker write-up constitutes cheating under The Code of Conduct for the McCombs School of Business.

**GRADUATE STUDENTS.** Please assess the students' speaker write-ups on a numeric scale of 0-3 as stated above. I anticipate the vast majority to be scores of 2, with only obvious outliers being 1's and 3's. (Do not assign half points.) Speaker write-up grades are due to me by 11:59 PM on Tuesday after every class. You need to keep these grades in your own semester gradebook.

While you have some latitude in determining and implementing speaker write-up criteria, it is necessary that there be significant commonality in evaluation criteria so there is a perceived and actual level playing field across teams for determining grades. In order to facilitate commonality in evaluation criteria, I might randomly ask you to forward me all of your group's speaker write-ups for the week. (So do **NOT** delete them!)

I reserve the right to adjust a student's speaker write-up grade as I see fit.

By 11:59 PM on Tuesday after every class, team leaders should confidentially e-mail all students their speaker write-up grade so group members know their performance and can adjust as desired.

***Significant Impressions paper and discussion.*** You are to complete a two-page Significant Impressions paper of the three most impressionable aspects of your volunteer experience that is due at the beginning of class on Tuesday, April 15. Group leaders will facilitate a team discussion during our last class session. Following this team meeting, a designated member(s) from your team will make a brief presentation to the entire class summarizing the top two-to-four experiences among your team members.

At the conclusion of this class session you will hand-in your Significant Impressions paper to the team leaders for evaluation. The instructor will also evaluate this paper. This is your take-away from the volunteer experience so there are no right or wrong answers. At the same time, meaningful thought and effort should be put into your ideas. The evaluation you receive on this paper will be based on factors such as, but not limited to, the following:

- Thoroughness of your ideas. They may tie to cited research or our guest speaker's comments, but this is not necessary.
- Quality of grammatical expression and organization (for example, a heading for each of your ideas and subheadings, if logical, are recommended).
- Your attendance in class that day and your participation in the group and class presentations

The Significant Impressions paper should:

- Be no longer than two pages (8.5" x 11"), double-spaced,
- Have one inch margins, and
- Use Times New Roman 12 font.

Your Significant Impressions paper will be rated by your team leaders. The same 0-3 scale will be used: (Do not use half points)

- 3 = excellent
- 2 = satisfactory
- 1 = unsatisfactory
- 0 = not turned in or turned in late

In order to earn all 11 points for this component of your grade, your significant impressions paper grade must be 2 or higher. However, do not take this to mean there is no advantage to writing a paper that earns a grade of 3. At the end of the semester if you are on the borderline of a grade cutoff (for example: A and A-, A- and B+, etc.) a score of 3 on your Significant Impressions paper could very well be the deciding factor in your final grade.

**GRADUATE STUDENTS.** *The leadership role you are being asked to play in this activity is the following:*

1. *Group leaders will facilitate a discussion within their team addressing the team's experiences. Following this team meeting, a designated undergraduate member(s) from your team will take a few minutes to share with the entire class key experiences among your team members*
2. *At the conclusion of class, graduate students will submit their Significant Impressions paper to me.*
3. *At the conclusion of class, undergraduate students will submit their Significant Impressions paper to the team leaders for evaluation by you on a numeric scale of 0-3 (use the grading standards as stated above.) All team leaders will evaluate the papers independently. Please clearly mark all team leader grades on the front page. All team leaders should also use different color pens to write comments throughout the paper. I anticipate the vast majority to be scores of 2, with only obvious outliers being 1s and 3s. Evaluations should be made based on the quality of insight and impression.*
4. *Your evaluation of the students' Significant Impressions papers will be turned in to me by Noon on Tuesday, April 22 in CBA 4M.202 for my evaluation. You also need to keep these grades in your own semester gradebook.*

**Thesis paper.** To earn a course grade of "B+", "A-", or "A" you must write a rigorous thesis paper pertaining to a speaker related topic, whether proposed formally or informally by the speaker, your team leaders, the instructor, or you. This paper is not required for a grade of "B" or below, but it is required for a grade above a "B." The topic must be approved by your team leaders by Tuesday, April 1. The thesis paper is due at Noon on Thursday, April 24 in 4M.202. Thesis papers must also be downloaded to SafeAssign on Blackboard by Noon on Thursday, April 24. The thesis paper should:

- Be no longer than 10 pages (8.5" x 11"), double-spaced (not including exhibits and works cited)
- Be no shorter than 8 pages (8.5" x 11"), double-spaced
- Have one inch margins
- Use Times New Roman 12 font
- Your thesis statement must be clearly stated at the end of your first paragraph
- Use MLA citation format

The standard to earn an A on the thesis paper, and thus an A in the course, will be very high. Papers will be evaluated by your team leaders and by the instructor based on, but not limited to, the following:

- Thoroughness and credibility of research, authority, and citations
- Relationship to guest speaker topics
- Quality of arguments and conclusions
- Quality of organization
- Quality of grammatical expression

**GRADUATE STUDENTS.** *Your role with the thesis papers is to:*

- a. *Approve topics (in consultation with me if you wish).*
- b. *Serve as a sounding board, advisor, and potential recommender of topics to your team members.*
- c. *Provide the following evaluation:*
  1. *Rank each thesis paper. The best thesis paper should be ranked #1.*
  2. *Assign a letter grade (A-F; +/- may be used if you desire) to each thesis paper.*
- d. *All team leaders will read all team members' papers and clearly indicate their grade on the first page. Please use different color pens when making comments.*
- e. *All graded papers must be submitted to me by Noon on Thursday May 1 in CBA 4M.202. I will read the bottom 2 ranked papers and the #1 ranked paper from each group.*

***Instructor's discretionary evaluation.*** The instructor will rely upon all assessment inputs from team leaders and independent evaluations as indicated above and below. In the event the instructor has additional information, or assesses a student's performance differently than others, he maintains the right to exercise discretionary decision making when assigning final grades. Absent additional or contradictory insights, the instructor will allocate these discretionary points in a manner consistent with the overall evaluation for all activities.

**There is no extra-credit work, make-up or other mechanisms for evaluating course performance beyond the activities described in this syllabus.**

**GRADUATE STUDENTS - Your semester grade will be determined by:**

9% - *CTC site manager evaluations*

9% - *Completing all IRS certifications on time*

9% - *Team leader evaluation*

*This will include both your undergraduate student evaluations and your co-leader(s) evaluation.*

9% - *Speaker write-ups*

*This will include, but is not limited to:*

- *Grading speaker write-ups appropriately under the guidelines stated above.*
- *Notifying your team members of their grade by the deadline stated above.*
- *Accurately and timely completing the task of sending me the speaker write-up grades by the deadline stated above.*

9% - *Undergraduate's Daily Grades*

*This will include, but is not limited to:*

- *Grading undergraduates appropriately under the guidelines stated above.*
- *Notifying your team members of their grade by the deadline stated above.*
- *Accurately and timely sending me the daily grades by the deadline stated above.*

9% - *Your Lesson Plans*

*At the end of every class you and your co-leader(s) will turn in to me your lesson plan for that day. Lesson plans should be no longer than one page, double-spaced, have one inch margins, and use Times New Roman 12 font. Handwritten lesson plans will **not** be accepted.*

9% - *Completing Volunteer Hours (the instructor reserves the right to increase this percentage if a student completes significantly less than 55 hours of volunteer service.)*

9% - *Significant Impressions paper*

*This will include, but is not limited to:*

- *The quality of your Significant Impressions paper.*
- *The quality of facilitating the Significant Impressions discussion.*
- *The quality of your evaluation of undergraduate Significant Impressions papers.*

9% - *Thesis Paper*

*This will include, but is not limited to:*

- *Your completion of a rigorous thesis paper as described above **OR** completing an extra 8 hours of volunteer time.*
- *The quality of your role, if requested, in students' feedback on their thesis paper.*
- *The quality of your evaluation of undergraduate thesis papers.*

19% - *Instructor's discretionary evaluation*

*This will include, but is not limited to:*

- *Your effectiveness as a group leader in managing your team and building enthusiasm and group discussion.*
- *Your ability to stay on the prescribed timeline for activities.*

So here is a cheat sheet to the weekly assignments:

Monday, 11:59 PM

Undergraduate Students

1. Submit speaker write-ups for tomorrow's class to group leaders

Tuesday, end of class

Graduate Students

1. Hand in lesson plan to me

Tuesday, 11:59 PM

Graduate Students

1. E-mail your group members their speaker write-up grade.
2. E-mail your group members their daily grade.
  
3. E-mail undergraduate's speaker write-up grades to me.
4. E-mail undergraduate's daily grades to me.

## Important Notifications

### Students with Disabilities

Students with disabilities may request appropriate academic accommodations from the Division of Diversity and Community Engagement, Services for Students with Disabilities, 512-471-6259, <http://www.utexas.edu/diversity/ddce/ssd/>.

### Religious Holy Days

By UT Austin policy, you must notify me of your pending absence at least fourteen days prior to the date of observance of a religious holy day. If you must miss a class, an examination, a work assignment, or a project in order to observe a religious holy day, you will be given an opportunity to complete the missed work within a reasonable time after the absence.

### Campus Safety

Please note the following recommendations regarding emergency evacuation from the Office of Campus Safety and Security, 512-471-5767, <http://www.utexas.edu/safety/>:

- Occupants of buildings on The University of Texas at Austin campus are required to evacuate buildings when a fire alarm is activated. Alarm activation or announcement requires exiting and assembling outside.
- Familiarize yourself with all exit doors of each classroom and building you may occupy. Remember that the nearest exit door may not be the one you used when entering the building.
- Students requiring assistance in evacuation should inform the instructor in writing during the first week of class.
- In the event of an evacuation, follow the instruction of faculty or class instructors.
- Do not re-enter a building unless given instructions by the following: Austin Fire Department, The University of Texas at Austin Police Department, or Fire Prevention Services office.
- Behavior Concerns Advice Line (BCAL): 512-232-5050
- Further information regarding emergency evacuation routes and emergency procedures can be found at: <http://www.utexas.edu/emergency>.

### Policy on Scholastic Dishonesty

The McCombs School of Business has no tolerance for acts of scholastic dishonesty. The responsibilities of both students and faculty with regard to scholastic dishonesty are described in detail in the BBA Program's Statement on Scholastic Dishonesty at <http://www.mcombs.utexas.edu/BBA/Code-of-Ethics.aspx>. By teaching this course, I have agreed to observe all faculty responsibilities described in that document. By enrolling in this class, you have agreed to observe all student responsibilities described in that document. If the application of the Statement on Scholastic Dishonesty to this class or its assignments is unclear in any way, it is your responsibility to ask me for clarification. Students who violate University rules on scholastic dishonesty are subject to disciplinary penalties, including the possibility of failure in the course and/or dismissal from the University. Since dishonesty harms the individual, all students, the integrity of the University, and the value of our academic brand, policies on scholastic dishonesty will be strictly enforced.

Scholastic dishonesty includes, *but is not limited to*: copying tests or assignments, representing (copying) the work of another person as one's own **or allowing another person to represent your work as their own**, collaborating without authority with another student during an exam or in preparing academic work, using or having on your desk unauthorized materials or aids to complete a quiz or exam (e.g., unauthorized cheat sheets, solutions, and electronic storage devices such as graphing or programmable calculators, cell phones, music players, etc), continuing work on an exam after a stop time has been announced, etc.

You should refer to the Student Judicial Services website at <http://deanofstudents.utexas.edu/sjs/> to access the official University policies and procedures on scholastic dishonesty as well as further elaboration on what constitutes scholastic dishonesty.

Below is a form of Scholastic Dishonesty that was a problem several years ago and will not be tolerated.

Please see the instructor's comments below, after you read Jackie's e-mail. Those stated policies still stand!

**From:** Jackie Blair  
**To:** Site Managers  
**Subject:** Signing In

Hello Managers! It has been brought to my attention that some of the UT students may be "fudging" on their hours a little. Example would be - said student arrives for their 8:30 shift at 8:45 and signs in on the volunteer sign in sheet as arriving at 8:30. Brian Lendecky, the class professor, has also gotten word of this and is NOT happy. (I watched him instill fear into 90 students of being failed yesterday when he made an announcement about this.) Please report to me or on the timesheet if you notice this happening.

I was at FC on Sat and noticed it myself - so I know it is happening more than once. This is not something that Brian wants you all to tolerate as he will not tolerate it. It is bad ethics and we need to make sure the students learn this.

Thanks!  
*Jackie Blair*

Brian's comments:

1. This is cheating. This is the same as handing in a research paper you did not write. When you hand in a paper you did not write, you are trying to get credit for work you did not do. That is what you are doing when you lie about what time you arrived at (or left) the tax centers.
2. Lying about your time is ten times worse than being late for your shift.
3. What would happen if you falsified your time card at a job?
4. This makes all of UT look bad. Not just you, but me and all your peers.
5. I have a list of six students who have done this regularly. They will not be getting credit for any of those shifts and I am considering failing them for the semester.
6. You need to write the EXACT time you arrive at the tax centers. If you arrive at 8:48, write 8:48. Not 8:45, not 8:40, not 8:30.

## Volunteering with Community Tax Centers

If you have not already done so, please register as a volunteer with Community Tax Centers (CTC). It's a simple process, but important.

- (i) You can't schedule your volunteer hours unless you register with CTC.
- (ii) You are in the CTC information flow for relevant volunteer updates if you register with CTC.

Please do the following actions so you will be registered for the required volunteer component of the class:

- Register as a Community Tax Centers volunteer by clicking on the following link:  
<https://web.volunteer2.com/Public/Signup/SignupDecide.aspx?OrganizationGUID=7ec98974-f6e1-41ac-87bb-a96ea60eb893>
    - In your application please indicate that you are with the UT practicum
  - Every student in the class must complete Basic **and** Advanced Training. There will be 3 basic training sessions offered for UT students only. Advanced training will be during our regularly scheduled class period. When you register as a volunteer you will not see these dates as options. **Please e-mail Jackie Blair (UTtraining@foundcom.org) directly with the training dates you want to attend.** You must pre-register for training; you cannot show up for training without first pre-registering with Jackie Blair. **You must register as a volunteer with the Community Tax Centers at the above attached link before e-mailing Jackie Blair with your preferred training date.** Jackie cannot sign you up for training until you have registered as a volunteer.
  - The three Basic Training session options are:
    - Friday and Saturday, January 17 and 18, from 9:00 - 1:00 PM in the MOD lab on the 5<sup>th</sup> floor of the Business School.
    - Friday and Saturday, January 17 and 18, from 1:30 - 5:30 PM in the MOD lab on the 5<sup>th</sup> floor of the Business School.
    - Friday January 24 from 9:00 - 5:30 (a half hour break for lunch will be given) in the MOD lab on the 5<sup>th</sup> floor of the Business School.
- You must know your McCombs computer lab login name and password!!!!!!**

### **Scheduling Your Volunteer Hours**

As soon as you attend Basic Training and pass the Basic Test, you can start volunteering!

Before you begin:

- **Plan your schedule** by reviewing the Tax Center locations and hours and writing down your preferred shifts. Please also determine alternative choices, as the specific timeframes of shifts may not fit your availability, and shifts close after the requisite number of volunteers sign up.
- Visit [www.communitytaxcenters.org](http://www.communitytaxcenters.org) to review the Tax Center locations and hours.
- **Consider your availability closely and select your shifts carefully.** The fewer schedule corrections we have to make, the better!

You will use MyVolunteerPage - the website on which you filled out your volunteer application – to create your schedule.

**Please print this message or keep it open in another window to refer to as you use the online scheduling tool.**

Step-by-step instructions on how to sign up for your desired shift:

1. Log in to your account at [www.myvolunteerpage.com](http://www.myvolunteerpage.com)
2. Enter your username and password. If you do not remember your username and password, email Jackie at Jackie.Blair@foundcom.org.
3. Select “Sign Up” tab.
4. Select the location and position in which you would like to work. The locations are listed with shifts through February 28.
  - a. There are 3 positions listed:
    - i. **Client Liaison** - As the first person a taxpayer encounters, the Client Liaison welcomes clients to the Tax Center, screens for eligibility and preparedness, collects documents, and assembles the information necessary for the Tax Preparer to complete the tax return in an efficient manner. The Client Liaison plays a critical role in ensuring that clients have a quality experience.
    - ii. **Tax Preparer** - Tax Preparer volunteers prepare tax returns for clients. All Tax Preparers must pass the IRS Certification Test and submit the Volunteer Agreement to Jackie Blair before they can prepare taxes.
    - iii. **Translator** - Spanish to English translation

**\*\*\* Only “Tax Preparer” shifts will count towards your practicum hours.\*\*\***

**Be VERY careful when you are signing up to make sure you have selected Tax Preparer.**

5. Check off the days and times you would like to work.
  - a. These shifts are all on a first-come-first-served basis.
  - b. If you have special circumstances that require different times than listed, please contact Jackie Blair. Jackie will attempt to make special arrangements for your schedule, when possible.
6. Hit “Save” at the bottom of the screen.
7. You will now be given the opportunity to confirm your shifts on the right.
8. You can now visit the “assignments” tab to view your full schedule.

**When signing up for shifts, you are signed up whether you hit “confirm” or not. You are signed up and holding a spot and we will be expecting you! Don’t click anything unless you want to sign up for sure.**

## **Important Notes**

The minimum service requirement for this class is 55 hours which must be broken out as follows:

- January 20 - February 28: you must complete a minimum of 30 hours. **At least 15 of these hours must be completed by February 15.**
- March 1 - March 31: you must complete a minimum of 15 hours. **At least 5 of your March hours must be completed between March 1 – March 16.**
- April 1 - April 15: you must complete a minimum of 10 hours.
- There are no “rollover” hours!!
- You may NOT work more than 6 hours in a day. Anything over 6 hours will not be counted for the course.

If your site manager tells you that you can leave your shift early (ex. there is nobody in line for help), you will get credit for the entire amount of the shift you signed up for.

If you stay late (past your scheduled shift) you will of course get credit for that extra time.

You are not required to keep a regular schedule - but if you have regular availability, you may find it helpful to pick a regular, recurring shift (e.g., every Tuesday from 3pm to 6pm at Foundation Communities).

You may sign up for different shifts at different locations. You are not required to do all of your volunteer time at a specific location. **Please select only shifts that you can commit to!**

If you cancel a shift without giving 48 hours notice or fail to show up for a shift, you will be required not only to make up that shift but also another shift of the same time length. (Please note - failure to show up for a shift will definitely affect your 16% of instructor’s discretionary evaluation.)

For example - Bob Smith cancels a 6-hour shift 36 hours before the shift starts. Bob must obviously make up that 6-hour shift. However, he must now also volunteer for ANOTHER 6-hour shift. In this example, Bob’s total volunteer time for the course has increased from 55 to 61 hours. (Note - these “bonus” hours can be made up in any month.)

Each volunteer Tax Preparer will need to have completed the necessary training and certification prior to their volunteer service. You will need to bring your completed and signed Volunteer Agreement with you to EACH location you volunteer.

**Please keep a record of what you signed up for by marking your calendar!** By signing up for a shift, your site managers, Jackie, and other volunteers will be relying on you to fulfill your commitment. **Also, make sure you track your actual hours worked on a calendar, on your phone, etc.**

Jackie’s contact information is:

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Foundation Communities

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