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

Thursday 3:30-5:20 - UTC 4.102 - Unique #02060/02265

Spring 2018 Syllabus

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Office Hours: After class in room UTC 4.102

Volunteer service period: January 22 – April 17, 2017
Volunteer sites and operating hours are self-selected and may vary. Sites (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’ (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 20,000 people and brought over $35,000,000 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 600 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, public policy, economic development, a day in the life of an IRS Special Agent, and volunteering in the community. In addition, training and certification to perform this community service activity will be provided.

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 an 8-hour basic training session (in the MOD lab) and 4 hours of advanced training (during class time on February 8 and February 15) offered through Community Tax Centers that covers tax law principles and how to use TaxSlayer software (also referred to as IRS training). You will also be required to take ITIN (Individual Taxpayer Identification Number) training online.
- Become certified as a tax preparer by passing both the basic and intermediate IRS certification tests and also completing the ITIN training. Your user name to take the tests needs to be “last-name.first-name”. Please use your last and first name as they appear on my official class roster.
- 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 in-class model is as follows:

- The first 45 minutes of class-time we will have team meetings
- The remainder of our class-time will be with guest speakers or special presentations

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

Teams and team leaders. The instructor will divide ACC 366P/384 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 primarily guest speakers or special presentations. 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/smartphone** policy during guest speakers, unless they ask you to use them.

Communications and e-mail on Canvas: The use of e-mail and Canvas is required for this course. When sending class-wide e-mails, I will use the e-mail addresses that are supplied to me on Canvas. However, any individual e-mails I send to you will be done via Outlook and those e-mail addresses are all McCombs addresses.
Any outside-of-class announcements that I make (e.g., syllabus changes, assignment changes, speaker date changes, etc.) will be sent to you via e-mail. It is possible that substantial content will be posted on Canvas or sent via e-mail. It is your responsibility to regularly check your e-mail (both your McCombs account and any other accounts that you might have set up for forwarding) and the class Canvas site.

**Undergraduate Student Evaluation**

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

<table>
<thead>
<tr>
<th>Item</th>
<th>Weightage</th>
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</thead>
<tbody>
<tr>
<td>Completing both IRS certification tests &amp; ITIN training on time</td>
<td>11%</td>
</tr>
<tr>
<td>Community Tax Center site manager evaluations</td>
<td>12%</td>
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<tr>
<td>Daily Grades</td>
<td>12%</td>
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<tr>
<td>Speaker Write-ups</td>
<td>11%</td>
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<tr>
<td>Completing Volunteer Hours</td>
<td>12%</td>
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<tr>
<td>Significant Impressions paper and discussion</td>
<td>11%</td>
</tr>
<tr>
<td>Instructor’s discretionary evaluation</td>
<td>16%</td>
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<tr>
<td>Total</td>
<td>85%</td>
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</tbody>
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A grade of “B+”, “A-”, or “A” may be earned in the course with the completion of a high quality rigorous thesis paper for an additional 15% of your course grade. 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.**

**IRS Certifications**

- For this class, you have to pass both the basic and intermediate IRS certification online tests. The website address to complete the tests will be given during our IRS Training sessions.

- Your user name to take the tests needs to be “last-name.first-name”. Please use your last and first name as they appear on my official class roster.

- There are two different due dates for the basic exam certificate:
  A. If you attend basic IRS training session #1 or #2 on Friday January 19 or Saturday January 20, your basic exam certificate is due at the beginning of class on Thursday January 25.
  B. If you attend basic IRS training session #3 on Friday January 26, your basic exam certificate is due at the beginning of class on Thursday February 1.

Note 1 – you all received instructions via e-mail before the semester started about how to sign up for basic training. See “intro e-mail” on our Canvas site for a copy of that e-mail.

Note 2 - At the end of the basic test, print out your certificate and bring it to class on the due date. I will then give this copy to our Community Tax Centers liaison. For class purposes, I don’t need a copy because I will check that you completed the test by the due date in the IRS system.

Note 3 – you can begin volunteering after you pass the basic exam.
Note 4-The intermediate exam certificate will be due after we complete advanced IRS training in class. They are due at the beginning of class on Thursday February 22.

Note 5- The ITIN (Individual Taxpayer Identification Number) training must be completed by Thursday February 15.

Community Tax Center (CTC) site manager evaluations
Site managers will provide input to the instructor regarding each student’s:

- Quality of work, attitude, professionalism, and punctuality. Unless instructed otherwise, talking or texting on cell phones is NOT permitted at ANY time when in the tax centers, even when you are not with a client. If you need to take or send an emergency call or text, please step outside briefly to do so.
- Effectiveness of CTC client interface and comportment, including adhering to 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. Please note that the only t-shirts allowed are UT t-shirts. All other t-shirts are NOT allowed. Fraternity and sorority t-shirts are NOT considered UT t-shirts per this syllabus, and are thus NOT allowed.
  - Unacceptable dress: Non-UT t-shirts, fraternity or sorority t-shirts, shorts, yoga pants, leggings as pants, workout clothes, hats, pajamas and flip-flops. This is necessarily not a complete list.

Downtime in between clients or when client volume is slow should be spent asking your site manager which administrative tasks can be helped with or done. Downtime or idle time should NOT be spent studying for other classes, texting, using social media or viewing the internet on your phone or computer, etc.

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 for this component of your grade, 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, and
- 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 the day of class. I highly recommend meeting right after class, determining these grades, and send them to me before you leave the classroom. You need to keep these grades in your own semester gradebook.

Also by 11:59 PM on the day of class, 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 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
By 3:00 on the day of 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, and
- 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 (ex. hand-written, etc.) will not be accepted.

Please note that copying material from a website without attribution for your speaker write-up constitutes cheating under The Code of Conduct for the McCombs School of Business. Further, even with full attribution, a cut/paste job does not constitute your work for this purpose.

**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. (Do not assign half points.) Speaker write-up grades are due to me by 11:59 PM after every class. (Note: This is the same e-mail described under Daily Grades. Just one e-mail for both grades.) 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 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.

**Completing Volunteer Hours**
Each undergraduate student must complete 55 hours of volunteer work as a tax preparer plus any bonus hours (discussed later in this syllabus) the student might have accrued. Graduate student requirements are discussed later in this syllabus.

**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 Thursday, April 20. Group leaders will facilitate a team discussion during our last class session. Following the team meetings, team members 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 (use headings if useful).
- 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 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 (ex. 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 (you also must write a significant impressions paper too):
1. Group leaders will facilitate a discussion within their team addressing the team’s experiences. Following this team meeting, designated 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 into my faculty mailbox in the Accounting department office (CBA 4M.202) by noon on Monday, April 23 for my evaluation. You need to keep these grades in your own semester gradebook.

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.

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 Thursday, April 5th. The thesis paper is due at noon on Wednesday, April 25 in 4M.202. Thesis papers must also be downloaded to Canvas by noon on Wednesday, April 25. 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 Roman 12 font type,
- 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, and
- 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 Wednesday May 2 in CBA 4M.202.

I will read the bottom 2 ranked papers and the #1 ranked paper from each group.

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% - Completing all IRS certifications & ITIN training on time

9% - CTC site manager evaluations

9% - Team leader evaluation
This will include both your undergraduate student evaluations and your co-leader evaluation. These will take place during our last class day.

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 that has a group meeting you and your co-leader 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 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
The instructor will rely upon all assessment inputs from 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. 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.
- How you represent the University of Texas in the community.
So here is a cheat sheet to the weekly deadlines:

**Day of class, 3:00 PM**  
**Undergraduate Students**  
1. Submit speaker write-ups to group leaders

**End of class**  
**Graduate Students**  
1. Hand in lesson plan to me

**Day of class, 11:59 PM**  
**Graduate Students**  
1. E-mail your group members their speaker write-up and daily grade *individually*.  
2. E-mail undergraduate’s speaker write-up and daily grades to me.

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**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/](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](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](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.mccombs.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.
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 follow these instructions in order so you will be registered for the required volunteer component of the class:

1. **Register as a Community Tax Centers volunteer by clicking on the following link:**
   In your application please indicate that you are with the UT practicum.

   You will receive an automated message when you register, but you should ignore the instructions in the email, which are written for volunteers from the community not associated with this class. Instead continue to #2.

2. **Sign up for Basic training by emailing your preferred date to CTC staff at UTtraining@foundcom.org:** The Basic training session options are:
   - Friday, January 19, 9:00am - 5:30pm
   - Saturday, January 20, 9:00am - 5:30pm
   - Friday, January 26, 9:00am – 5:30pm

   - You will earn one bonus hour for every fifteen minutes you are late starting at 9:10 (at 9:25 you will have earned one bonus hours). On-time means in your seat, logged in, and ready to go.
   - Basic training is held in the MOD lab on the 5th floor of the Business School. You’ll be given a 45-minute break for lunch. **You must know your McCombs computer lab username and password!!!**
   - You must pre-register for Basic training. Do not show up for a training unless you have received email confirmation from CTC staff that you are registered.

Scheduling Your Volunteer Hours
As soon as you attend basic IRS training and pass the basic test, you can start volunteering!

Before you begin:
- **Plan your schedule** by reviewing the CTC 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.
- **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 after you’ve attended training. You cannot access the schedule before training.
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). If you do not remember your username and password, email Gwen at Gwen.Moore@foundcom.org.
2. Select the "Opportunities" tab.
3. Select the location and the volunteer role in which you would like to work. There are 3 volunteer roles listed:
   - **Tax Preparer** - Tax Preparer volunteers prepare tax returns for clients.
   - **Client Liaison** - Client Liaison volunteers welcome clients, screen for eligibility and preparedness, collect documents, and assemble the information necessary for the Tax Preparer to complete the tax return in an efficient manner.
   - **Translator** - Translators provide Spanish/English translation for clients who need it.
   - Select the “sign up” button next to the time slot you would like.

   *** 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.

4. Select the “sign up” button next to the time slot you would like.
5. To remove yourself from a shift, go to the “schedule” tab and click “remove” next to your chosen shift. Be sure to click “remove” again in the window that pops up.

Important notes:

- Once you have clicked “sign up,” you are on the volunteer schedule.
- When the shift is less than 48 hours away, you cannot cancel using the online system. If you must cancel, contact Gwen Moore so that she can try to fill your spot on the schedule.
- Our staff uses the schedule to make on-site decisions. Please sign up a week in advance as possible.
- Shifts are on a first-come, first-served basis.
- If you have special circumstances that require different times than listed, please contact Gwen Moore. We will attempt to make special arrangements for your schedule, when possible.
- The “schedule” tab will show all the shifts you have signed up for. Remember, these are times that staff expect you to be on-site.
**Important Notes from the instructor about volunteering**

The minimum service requirement for this class is 55 hours which must be broken out as follows:
- January 22 – 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 17 – you must complete a minimum of 10 hours. Note: All sites are closed on Sunday April 1 for Easter.

- There are no “rollover” hours!!
- Bonus hours are assigned for shortages (see below).
- You may NOT work more than two shifts in a day. Anything over two shifts 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!**

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, Gwen, 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.**

**Bonus Hours**
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.)

There are several ways to get bonus hours:
- cancelling a shift within 48 hours
- not showing up for a shift
- using a spot as a client liaison or translator instead of tax preparer
- arriving late for training
- not reaching your monthly (or inner-monthly) required hours

Professionalism is very important and there are some things that could affect your grade should we see repeat instances.

Notes on professionalism in the Community Tax Centers:
- Unless instructed otherwise, cell phones must be in hand bags or backpacks while assisting clients. Any use of your phone is unacceptable.
- It is extremely important to follow the dress code while volunteering.
- Signing in and signing out: Mark down the actual times you arrive and leave.
- Scheduling shifts: Use the volunteer website to sign up IN ADVANCE for shifts you can commit to. Do NOT sign up for a shift just to hold a space for yourself.
- Dropping in to work a shift is not acceptable, and you will not receive credit for it.

Gwen’s contact information is:
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