

VOLUNTEER ORIENTATION AND TRAINING

Orientation and Training sessions will be offered to each volunteer. Training for all volunteers will be held in January of each year.

"Orientation" involves giving volunteers an adequate history of the KC CASH Coalition and the VITA program, the overall programs provided, the clientele to be served, operation, and general knowledge of policies and procedures.

"Training" will provide volunteers with the required instructions for the specific job with the related skills and behavior that are needed to perform the-particular volunteer position.

TRAINER TRAINING

The Trainer is responsible for training Tax Preparers and Quality Reviewers in tax law and in the use of IRS-supplied income tax software. First time trainers are welcome but they should have experience as Tax Preparers. Trainers will be trained by the IRS and the training will usually occur in December prior to the start of the tax season. The class is typically 6 to 8 hours long and will include only federal income tax law. All training is performed using IRS-supplied software.

SITE COORDINATOR TRAINING

Site Coordinator training will be held in January prior to the start of the tax season . *This will consist of two 3-hour sessions. The first session will be facilitated by the IRS and will cover technical training and quality control. The second session will be facilitated by a member of KC CASH and will cover the policies and procedures of the sites.*

TAX PREPARER TRAINING

Volunteers are provided training in tax law and the computer software (16-21 hours). The tax law class can be taken self-study (online or a textbook) or in a classroom setting. Completion includes satisfactory performance of an IRS test. The computer software training must be taken in a classroom setting. Courses are available on a first-come, first-served basis. They will be canceled for low enrollment. You will be notified if your selected course is canceled. When you attend the classroom sessions, please bring paper for taking notes, a highlighter, and your favorite pen/pencil. We will provide the training materials.

TaxWise software AND Tax Law training are required. You can attend a Tax Law class in the classroom OR take self-study with a student textbook or online. If you elect self-study or online training, you will need to attend the classroom training for TaxWise software. If you sign up for the combined Tax Law and TaxWise training, you do not need to sign up for a separate TaxWise class.

GREETER/INFORMATION ASSISTANT/INTERPRETER TRAINING

A two-hour training session will be offered and will cover an orientation, a review of site processes, and a summary of the duties of each of these volunteer positions.

Quality Control

No particular training session is offered.

Description of Tax Preparer Courses

TaxWise - for volunteers taking Tax Law class self-study (student guide or online-“Link and Learn”)- This class will instruct on the tax software used to prepare the tax returns. If you are signed up for a combined Tax Law and TaxWise class, you do not need to take this class.

Combined Tax Law & TaxWise - (recommended for new and returning volunteers) - This class will instruct on tax law and TaxWise software simultaneously and will be held in a computer lab. These courses require your attendance on all of the dates shown for the course.

Tax Law - Self-Study - (recommended for returning volunteers) - The student guide will be mailed directly to the mailing address given on the training selection form. The student will review the Tax Law student guide and complete the Tax Law test at his/her own pace. The student will be mailed additional handouts (corrections to the student guide, test, and instructions for returning the test) in December.

Tax Law - Online- “Link and Learn” - (recommended for returning volunteers) - The online student tax law training is the same as the self-study guide except the student will take the training and test online at

<http://www.irs.gov/app/vita/index.jsp> . The student will print out the test certification. The student will be mailed additional handouts (corrections to materials and test, and directions to return the test certification) in December.

Condensed/Combined Tax Law & TaxWise - (recommended for returning volunteers) - This one-day class provides integrated tax law and TaxWise training for experienced, returning volunteers.