

Washington, Warren & Northern Saratoga Co. VITA Training Sessions 2020-2021

The training class sessions for the Volunteer Tax Preparers will be held at the **Stored Tech Collaboration Center, 543 Queensbury Ave, Queensbury, NY (near the Warren County Airport)**. This new location features a 25'x14' video screen, internet access and a much larger space to adhere to the social distancing protocols while maintaining our classroom instruction model. **Class size is limited to 20 people per session so advanced registration is required.**

The traditional multi-week class option has daytime (Track #1) and evening (Track #2) sessions. The Saturday Track #3 is faster paced, and the specialty topic Track #4 allows students more instruction and practice on these advanced topics. You may mix/match attendance amongst all tracks to fit your availability and knowledge level.

Please reserve your space for each session you will attend.

The Daytime classes run 9-noon with extra time available with the instructor till 1pm. The evening sessions 6-9pm are open @ 5pm so you may come early to practice on the computer or speak individually with the instructors. Formal class instruction will begin at 6:00pm. The Saturday classes are 9am – 3pm. Bring a lunch.

Training materials are available from local site coordinators, see tricountyunitedway.org for contact information.

class	#1 Day 9:00 - noon	#2 Night 6:00- 9:00p	Multi -week Traditional class description
#1	Thur 11/12	Thur 11/12	Program overview, introductions, forms, intake process, interviewing, Part 1: Getting started and filing basics
#2	Wed 11/18	Wed 11/18	Part 2: Filing status, dependents, exemptions, TaxSlayer
#3	Tues 12/01	Tues 12/01	Part 3: Income, wages, interest, pensions, unemployment, social security TaxSlayer – will look at 1040 lines and links to input the income figures
#4	Tues 12/8	Tues 12/8	Part 3, 4, 5: Business income, capital gains, and other income, Adjustments to income, deductions, and standard vs itemized, computing tax. TaxSlayer – related 1040 lines and links
#5	Wed 12/16	Wed 12/16	Part 5: Non-Refundable Credits – Dependent Care credit, Child Tax Credit, Education & Misc credits. Will cover the NYS issues with these credits along with the TaxSlayer.
#6	Wed 01/06	Wed 01/06	Part 5, 6&7: Payments & Refundable Credits, EITC, along with an overview of stock sales and VT returns. TaxSlayer 1040 lines and links
#7	Wed 01/13	Wed 01/13	Part 8: finishing a return, quality review, steps to processing, using the tax summary form, printing and signing, documents to keep etc.
#8	Wed 01/20	Wed 01/20	Update meeting – Go over last minute changes to Tax law, TaxSlayer, Procedures, etc. Handout resource materials.
	#3 Saturday	classes	suggested for returning volunteers and those who miss other classes
	01/09	1	9am – 3pm combines above classes #1, 2, 3
	01/16	2	9am – 3pm combines above classes #4, & 5
	01/23	3	9am – 3pm combines above classes #6, 7 & 8
	#4 Specialty	Topics	for returning volunteers and those wanting more in depth training
#1	Tues 12/15	6-9 pm	Business income, capital gains, stock sales, sched K
#2	Tues 01/05	6-9pm	Premium tax credit, Health Savings Accounts, Cancellation of Debt, Economic Impact Payment
#3	Thur 01/14	6-9pm	Extra help with instructor and practice session for testing issues
#4	Thur 01/21	6-9 pm	#8 Updates, tax law changes, Procedures, Handouts

Other training opportunity Links:

Taxslayer practice lab and training videos @ <https://vita.taxslayerpro.com> The password is TRAINPROWEB
Link & Learn @ <https://apps.irs.gov/app/vita/> – choose a course level and begin, also access the practice lab from here.
Rochester CASH Coalitions training @ <https://empirejustice.org/cash-training-center/> - “Tax Preparers” & “Resources”
Prosperity Now training modules @ <https://prosperitynow.org/TONTraining> Watch the videos from your living room