

Washington, Warren & Northern Saratoga Co. VITA Training Sessions 2021-2022

The interactive training class sessions for the Volunteer Tax Preparers will be held at the **Moreau Community Center 144 Main St, South Glens Falls, NY**. The building looks like a church on the corner of Main St and New St. This is a few blocks south of the big intersection with Stewarts and McDonalds. This location is large enough for 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, combining several of the smaller sessions together. This year the specialty topic Track #4 will be online. You may mix/match attendance amongst all tracks to fit your availability and knowledge level.

Reserve space via email to dprouty@capital.net. Or call 518-746-2560

The Daytime classes run **9:45- 12:45**. 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 once they arrive sometime in November.

class	#1 Day 9:45 – 12:45	#2 Night 6:00- 9:00p	Multi -week Traditional class description
#1	Fri 11/12	Mon 11/08	Program overview, introductions, forms, intake process, interviewing, Part 1: Getting started and filing basics
#2	Fri 11/19	Mon 11/15	Part 2: Filing status, dependents, exemptions, TaxSlayer
#3	Fri 12/03	Mon 11/29	Part 3: Income, wages, interest, pensions, unemployment, social security TaxSlayer – will look at 1040 lines and links to input the income figures
#4	Fri 12/10	Mon 12/06	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	Fri 12/17	Mon 12/13	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	Fri 01/07	Mon 01/03	Part 5, 6&7: Payments & Refundable Credits, EITC, along with an overview of stock sales and VT returns. TaxSlayer 1040 lines and links
#7	Fri 01/14	Mon 01/10	Part 8: finishing a return, quality review, steps to processing, using the tax summary form, printing and signing, documents to keep etc.
#8	Fri 01/21	Mon 01/17	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
	01/08	1	9am – 3pm combines above classes #1, 2, 3
	01/15	2	9am – 3pm combines above classes #4, & 5
	01/22	3	9am – 3pm combines above classes #6, 7 & 8
	#4 Specialty	Topics	for returning volunteers and those wanting more in depth training
#1	Wed 12/15	6-9 pm	Business income, capital gains, stock sales, sched K
#2	Wed 01/12	6-9pm	Premium tax credit, Health Savings Accounts, Cancellation of Debt, Economic Impact Payment, Advanced Child Tax Credit
#3	Wed 01/19	6-9pm	Extra help with instructor, practice session for testing issues, and more

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