

Washington, Warren & Northern Saratoga Co. VITA Training Sessions 2023-2024

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.

The traditional multi-week class option Track #1 has EVENING sessions 6-9pm is open @ 5pm so you may come early to practice on the computer or speak individually with the instructors.

The Traditional multi-week Daytime Track #2 sessions run 9:00-noon

The Saturday Track #3 classes are 9am – 3pm. Bring a lunch.

This is faster paced, combining several of the smaller sessions together.

You may mix/match attendance amongst all tracks to fit your availability and knowledge level.

Reserve space via email to jprouty2@gmail.com. Or call Tri County United Way 518-793-3136

Training materials are available from local site coordinators once they arrive sometime in November.

class	#1 Evening 6-9pm	#2 Day 9-noon	Multi -week Traditional class description
#1	Mon 11/06	Thur 11/02	Program overview, introductions, forms, intake process, interviewing, Part 1: Getting started and filing basics. TaxSlayer
#2	Mon 11/13	Thur 11/16	Part 2: Filing status, dependents, exemptions, TaxSlayer
#3	Mon 11/20	Thur 11/30	Part 3: Income, wages, interest, pensions, unemployment, social security TaxSlayer – will look at 1040 lines and links to input the income figures
#4	Mon 11/27	Thur 12/07	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	Mon 12/04	Thur 12/14	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	Mon 12/11	Thur 12/21	Part 5, 6&7: Payments & Refundable Credits, EITC, along with an overview of stock sales and VT returns. TaxSlayer 1040 lines and links
#7	Mon 01/08	Thur 01/04	Part 8: finishing a return, quality review, steps to processing, using the tax summary form, printing and signing, documents to keep etc.
#8	Mon 01/08	None	Specialty topic – TBD – and Extra help with instructor, practice session for testing.
#9	TBD	TBD	Update meeting – Go over last minute changes to Tax law, TaxSlayer, Procedures, etc. Handout resource materials.

Class	#3 Saturday	suggested for returning volunteers and those who miss other classes
#1	01/06	9am – 3pm combines above classes #1, 2, 3
#2	01/13	9am – 3pm combines above classes #4, & 5
#3	01/20	9am – 3pm combines above classes #6, 7 & 9

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.

Prosperity Now training modules @ <https://prosperitynow.org/TONTraining> Watch the videos from your living room.