

District 9 Returning Volunteer Orientation Training

TY 2023



■ Google Meet Tips

1. Turn on/off your microphone
2. Turn on/off your camera
3. Chat
4. Raised Hand

■ Introductions!

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- AARP Tax-Aide Training Coordinator – District 9
- 9 years with Tax-Aide

Joint effort with Tax-Aide
and VITA volunteers

MFS CASH Oregon
sponsors and host the
online training

■ Agenda

1. Certification and Learning Map presentation
2. Moodle – online training
3. Link & Learn Certification
4. Oregon VITA & Tax-Aide website overview
5. Home Stretch meeting

■ Tax-Aide vs VITA

- AARP Tax-Aide vs VITA programs
 - VITA has Adjusted Gross Income (AGI) limit of \$60,000
 - focus on lower income taxpayers
 - Tax-Aide focus on - lower income and senior taxpayers
 - Both programs have scope limitations-but also differ
- ***Certification for Tax-Aide allows you to work at a VITA site....but not the reverse!!!!***

■ Certification Training

■ Tax Preparation Certification Training



■ IRS Link & Learn Certification Tests

- New software vendor
 - 1st go-live 11/15/2023 – buggy and unstable
 - 2nd go-live 12/01/2023 – still buggy and unstable
 - 3rd go-live 12/11/2023 – fingers crossed
- Poor communication from vendor
- Support questions not answered
- New URL
 - linklearntaxescertification.com

■ IRS Link & Learn Certification Tests

- linklearntaxescertification.com
- Accounts rolled over from old Link & Learn site
- Need email or user ID from old system
- Request a password reset for the new system
- Reset email will be sent to email listed in the old system
- Can login to the email in the old system

■ IRS Link & Learn Certification Tests

- IF the email address in the old system is no longer active or accessible – then create a new account
- IRS Advanced Test Tip Sheet – on website
- Need to create new password
 - No special characters
- Go to My Account tab to update any data e.g. year of service, city (your address), email etc.

■ IRS Link & Learn Taxes Lessons

- Link & Learn e-Learning – topic based
- Links on new site???
- Links on old site - yes
 - Are updated for TY 2023
 - Do NOT require a login
- In case the old site goes away!!!
 - URL for just the e-learning
 - apps.irs.gov/app/vita .

■ AARP Learning Management System - LMS

■ LMS

- At least two courses will be required
- More if you are a Local or Site coordinator
- No information when the LMS will be available
- Is the last item needed to complete Tax-Aide certification
 - Wait will January???
- Will send an email when LMS is up and running

■ Three Training Resources

- Moodle – federal and state
- Link & Learn e-Learning
 - Federal only
 - Topic based
- Pub 4461 – Training Guide – federal only
 - IRS version -
 - NTTC modified/rewritten version

■ Tax-Aide NTTC Modified Materials

- National Tax Training Committee (NTTC)
- NTTC modifies IRS material for Tax-Aide program **only**
- NTTC materials on ortaxvolunteers.org is password protected.
 - Password persists for 2 weeks
 - Okay to save password to browser password saver
 - Training > Training & Certification > TaxAide and NTTC Documents

■ Learning Map

- [Learning Map](#) is a guide to VITA **or** Tax-Aide certification
- Some of us have problems with the links in the Learning Map
- If links in Learning Map don't work:
 - Download the Learning Map PDF
 - Links will work from your local device

Learning Map Demo



■ Why Moodle?

- Moodle software used for online learning
 - Used nation-wide by higher Education
 - Allows for self-paced learning
- Everything training related is in one location
 - Provides volunteers everything they need from start to completing certification
- This is our 4th year using Moodle
- Nationally recognized, by the IRS, for TY 2022!

■ Overview of Moodle

- Online, self-paced study
- Developed to be complete training for all levels of volunteers
 - Single course encompasses new and experienced volunteers
- Broken up into 3 main sections
- Includes links to IRS Exams in the course

■ Introduction to Moodle

- Volunteers will be able to take a self-guided, online training course on Moodle
 - New [Learning Pathways](#) for TY 2023!
 - Volunteers will self-select a pathway to work through
 - Teaches federal and Oregon tax law, TaxSlayer, and the basics of being a volunteer tax preparer
 - Contains Deeper Dives on selected topics
- Includes videos, recommended readings, quizzes/activities, and links to IRS publications and exams

■ Overview of Moodle – Learning Pathways



**ALL
VOLUNTEERS**

All volunteers enrolled in this course, regardless of experience level or intended role, should interact with this material.



**CLIENT
FACILITATORS
&
INTERPRETERS**

Volunteers interested in a role outside of tax preparation, such as Client Facilitator, Greeter, or Interpreter should interact with this material.



**TAX
PREPERATION
101**

Volunteers who have no prior tax preparation experience, and are new to taxes should interact with this material.



**TAX
PREPERATION
201**

Volunteers with some tax experience, either returning volunteers with 2-5 years of experience or new volunteers with professional tax experience, should interact with this material.



**TAX
PREPERATION
301**

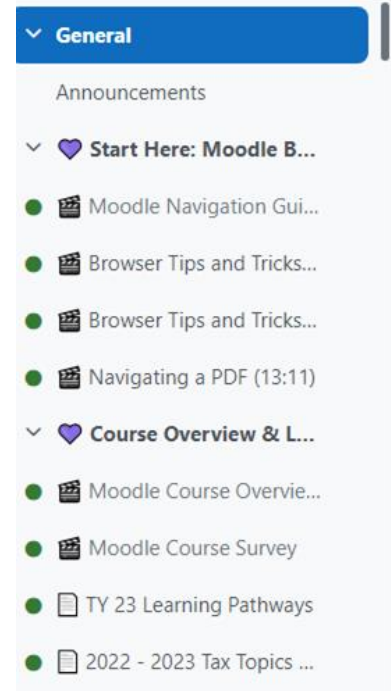
Volunteers who have many years (5+) of experience with volunteer tax preparation, and have volunteered continuously should interact with this material.

■ Moodle Updates - Course Index

- Moodle has updated and there are new features!
- Course Index
 - Left sidebar, shows all items in the course
 - Default is to show expanded
 - Can expand / collapse by section
 - Will keep last used as default
 - Green means the activity is completed
 - New naming convention to make it easier to navigate

TY 2023 RV Orientation

• Icon instead of text to denote activity type



The screenshot shows a Moodle course index sidebar. At the top is a blue header with a downward arrow and the text 'General'. Below this is a section for 'Announcements'. The main list of items includes: a purple heart icon followed by 'Start Here: Moodle B...', a green circle with a filmstrip icon followed by 'Moodle Navigation Gui...', a green circle with a filmstrip icon followed by 'Browser Tips and Tricks...', another green circle with a filmstrip icon followed by 'Browser Tips and Tricks...', a green circle with a filmstrip icon followed by 'Navigating a PDF (13:11)', a purple heart icon followed by 'Course Overview & L...', a green circle with a filmstrip icon followed by 'Moodle Course Overvie...', a green circle with a filmstrip icon followed by 'Moodle Course Survey', a green circle with a document icon followed by 'TY 23 Learning Pathways', and a green circle with a document icon followed by '2022 - 2023 Tax Topics ...'.

■ Moodle Updates - Navigation

- Navigation now happens via course index, or breadcrumbs
 - ***No more previous / next buttons***
- Can always click “course” to get back to the home screen of the course

The screenshot shows a Moodle course page for '2023: Oregon Volunteer Tax Preparer Training'. At the top, there is a breadcrumb trail: '2023 Training / Adler Case (~1.5hrs)'. Below this, the course title is displayed. A navigation menu includes 'Course', 'Settings', 'Participants', 'Grades', 'Reports', and 'More'. A blue arrow points to the 'Course' link. Below the menu, there is a 'Back to TY 2022 Case Studies' link with a blue arrow pointing to it. The main content area shows the current section 'Adler Case (~1.5hrs)' with a sub-section 'Use Tax Year 2022 TaxSlayer Software'. A list of lessons follows: 'Introduction to Adler Case (8:09)', 'Intake Interview (21:28)', 'Getting into TaxSlayer (5:39)', 'Preparing the Adler Return (51:05)', and 'Adler Case Solution'. An 'Expand all' link is visible on the right side of the page.

■ Moodle Updates - Content

- 5 core cases this year
 - Added one case “Adler” with just a W-2 to get new volunteers familiar with TaxSlayer (TS) before tax law
- Not all items have a TS video this year
 - Items that have been seen before will not have a video
 - If volunteers get stuck, they can call the hotline
- Tax Prep Basics is built into the cases
 - No longer a separate section
- New Client Facilitator / Interpreter material

■ Resources

- Moodle Navigation, Course Overview, Tech Tips & Virtual Chatroom
- Learning Pathways Document
- Training Support Hotline
 - Available beginning 11/13; 7 days a week; 9:00 am – 9 pm
 - Staffed with experienced volunteers
- Resource Library
- All 3 IRS Exams
- Course Survey
 - Aimed at helping improve the course

■ Overview of Moodle - Core Cases

- General Core Course Overview:
 - Case 1: Adler (TY 2022) - Pathway: 101
 - Case 2: Booker (TY 2022) - Pathway: 101
 - Case 3: Cruz Hernandez (TY 2022) - Pathway: 101 & 201
 - Case 4: Dobashi (TY 2022) - Pathway: 101, 201 & 301
 - Case 5: Ellington (TY 2022) - Pathway: 101, 201 & 301

■ Overview of Moodle - What's New in TY 2023?

- What's New in TY 2023? - All Pathways
 - What's New in TY 2023 Overview Presentation
 - Case 5: Green - What's New in TY 2023 (TY 2023)
 - Case 6: Harrison - What's New in TY 2023 (TY 2023)
- Federal available late December
- Oregon available mid January

■ Tax Topics Matrix TY 2022 - 2023

- [Tax Return Topics Matrix](#)
 - Shows what tax topics are present in each case
 - Will be updated with Green & Harrison cases when available
- Included in the Course Overview in Moodle

■ Deeper Dives – Advanced Topics

- Selected topics to delve further
- Courses:
 - Tax Preparers Toolbox
 - The Intake Interview
 - Dependents, Filing Status & Maximizing Refunds
 - Education Credits
 - Medicaid Waivers Payments
 - Self-Employment
 - Capital Gains & Investment Earnings
 - Client Facilitators & Interpreters
 - Virtual Tax Preparation

■ Moodle Access Year-round

- The Moodle Course will be open and accessible all year once it opens!
- Use as a resource to come back to when you have questions during tax preparation
- Training can happen at any time!
 - Not just used to certify, but used to further knowledge during tax season
- Encourage volunteers to continue using the course, especially if they need more help!

Moodle Demo!



Questions?



■ Miscellaneous

- Training – okay to use personal computer
- Chromebooks provided at Tax-Aide and VITA sites
 - Okay to use for training
 - Used to prepare taxpayer's returns **ONLY!!**
- IRS and NTTC materials – federal return **only!!!**
- In Moodle **or** on website - state return materials – **only!!!**

■ Miscellaneous

- TY 2023 NTTC Workbook
 - 11 core exercise returns
 - 11 comprehensive exercise returns
 - Online as a PDF
 - 15-20 printed copies available
 - **Please do NOT take if not going to use**
 - Will email answers as soon as NTTC releases them

■ Miscellaneous

- AARP Tax-Aide Qualifying Child or Relative Resource Tool (previously know as “tri-fold”)
 - Available online
 - Eight pages (“quad-fold”)??? – NOT laminated
 - In color
 - Will distribute at the Home Stretch training

■ 13615 Volunteer Agreement

■ Signed 13615 Volunteer Agreement

- Due by 1/20/2024
- Email to district09.ta@gmail.com
- Subject line: **13615 *lastname, firstname***
 - *E.g. 13615 Andersen, Lois*

■ Additional Training Meetings

■ Home Stretch Meeting

- **ALL volunteer preparers – new and returning**
- Saturday January 20, 2024 – 9 am – 4:00 pm??;
Willamette High School
- Send suggestions for topics you'd like covered

■ New District Coordinator/Sites

- Lane County is now one district – 09
- Collete Arnold is the new District Coordinator
- Will meet her at the Home Stretch meeting
- Tax-Aide sites open:
 - Fern Ridge Library, Eugene Library, LCC, Willamalane, Education Center and Oakridge
- VITA site open:
 - Goodwill (on Seneca)

Questions?

