

Suggested 6 Week Moodle Course Schedule

Week	Topic	Objectives
1	Log into the Moodle course <ul style="list-style-type: none"> ● Review START HERE module (~1hr) ● Familiarize yourself with Resource Library Pass first two IRS exams (1-2 hrs) <ul style="list-style-type: none"> ● Volunteer Standards of Conduct ● Intake Interview and Quality Review 	<ul style="list-style-type: none"> ● Set up Moodle account ● Be familiar with navigating the course ● Be familiar with IRS Publication 4012 ● Know basics of scope of VITA program
2	TY 2023 Case Studies (~9hrs) <ul style="list-style-type: none"> ● Anders Case (TY 23) ● Beaux Case (TY 23) ● Castillo Lopez Case (TY 23) 	<ul style="list-style-type: none"> ● Be able to conduct an intake interview ● Start a return in TaxSlayer Practice Lab ● Determine filing status ● Prepare a return for a taxpayer with an ITIN ● Use dependency calculators ● Prepare a return with a simple education credit
3	TY 2023 Case Studies (~9hrs) <ul style="list-style-type: none"> ● Davis Case (TY 23) ● Efron Case (TY 23) 	<ul style="list-style-type: none"> ● Prepare a return with complex self-employment income ● Prepare a return with complicated education credits ● Prepare a return with retirement income ● Prepare a return with itemized deductions ● Prepare a return with Oregon specific credits and adjustments
4	TY 2024 Case Studies (~9hrs) - <i>Available mid December</i> <ul style="list-style-type: none"> ● What's New in TY 2024 Presentation ● TY 2024 Cases 	<ul style="list-style-type: none"> ● Understand important tax law updates of tax year 2024 ● Prepare returns in TY 2024 software ● Learn the basics of Federal and Oregon tax law for TY 2024 ● Be prepared for the IRS Advanced exam
5	Pass IRS Advanced Exam (~4hrs) <ul style="list-style-type: none"> ● Upload signed Volunteer Agreement 	<ul style="list-style-type: none"> ● Be certified to volunteer and prepare tax returns!
6	Work on Deeper Dives <ul style="list-style-type: none"> ● Optional, but highly recommended 	<ul style="list-style-type: none"> ● Talk with your site coordinator to see if there are Deeper Dive sections that are helpful for your site.

Suggested 3 Week Moodle Course Schedule

Week	Topic	Objectives
1	<p>Log into the Moodle course</p> <ul style="list-style-type: none"> ● Review START HERE module (~1hr) <p>Pass first two IRS exams (1-2 hrs)</p> <ul style="list-style-type: none"> ● Volunteer Standards of Conduct ● Intake Interview and Quality Review <p>TY 2023 Case Studies (~6hrs)</p> <ul style="list-style-type: none"> ○ Anders Case (TY 23) ○ Beaux Case (TY 23) 	<ul style="list-style-type: none"> ● Have a Moodle account set up & be familiar with navigating the course ● Be familiar with IRS Publication 4012 ● Know basics of scope of VITA program ● Be able to conduct an intake interview ● Start a return in TaxSlayer Practice Lab ● Determine filing status
2	<p>TY 2023 Case Studies (~12hrs)</p> <ul style="list-style-type: none"> ● Castillo Lopez Case (TY 23) ● Davis Case (TY 23) ● Efron Case (TY 23) 	<ul style="list-style-type: none"> ● Prepare a return for a taxpayer with an ITIN ● Use dependency calculators ● Prepare a return with complex self-employment income ● Prepare a return with education credits ● Prepare a return with retirement income ● Prepare a return with itemized deductions ● Prepare a return with Oregon specific credits and adjustments
3	<p>TY 2024 Case Studies (~9hrs) - <i>Available mid December</i></p> <ul style="list-style-type: none"> ● What's New in TY 2024 Presentation ● TY 2024 Cases <p>Pass IRS Advanced Exam (~4hrs)</p> <ul style="list-style-type: none"> ● Upload signed Volunteer Agreement 	<ul style="list-style-type: none"> ● Understand important tax law updates of tax year 2024 ● Prepare returns in TY 2024 software ● Know the basics of Federal and Oregon tax law for TY 2024 ● Be prepared for the IRS Advanced exam ● Be prepared to volunteer and prepare tax returns!