

Accounting 4398
Independent Study - VITA Program Practicum
University of Texas at El Paso
Spring 2020

Instructor Contact Information

Instructor: Dr. Rebeca Pérez, Ph.D., Assistant Professor of Accounting
Office: 215 Business Administration Building
Telephone: (915) 747-6028
Email (best): rperez43@utep.edu
Office Hours: By appointment

Course Materials

Laptop Computer: Software used for this class is all online. Please bring a fully functioning laptop computer.

If you do not own a computer, the UTEP library loans out laptop computers:

<https://www.utep.edu/technologysupport/TSCenter/TechnologySupportCenter.html#S05>

Remaining course materials will be provided to the students.

Pre-requisites

Completion of ACCT 3322 (Intermediate Accounting II) with a C or better.

Completion of ACCT 3327 (Federal Income Tax - Individuals) with a C or better.

Course Description

This independent study seeks to integrate academic learning, practical application of individual tax concepts, and community service through implementation of the Volunteer Income Tax Assistance (VITA) program for low-income filers.

Accommodations for Students with Disabilities

If you have or suspect a disability and need accommodations, you should contact Center for Accommodations and Support Services (CASS) at 915-747-5148. You may also email the office at cass@utep.edu or visit the office in the Union Building East, Room 106. For additional information, please visit the CASS website at <http://sa.utep.edu/cass/>

Student Evaluation

All the items below must be completed. Once completed, the weighting on your final letter grade will be as follows:

Attending certification training	15 %
Completing and passing all certification tests on time	15 %
Attendance (volunteer hours)	30 %
Significant impressions paper	30 %
Instructor discretionary evaluation	10 %

Certification Training and Certification Tests (30 points)

For this course, you must pass the *basic*, *advanced*, and *foreign student* IRS certification online tests. To prepare you for the tests, you must attend the certification training offered as part of this course held on January 13th- 15th.

Attendance (Volunteer Hours) (30 points)

Your presence and your time are the core of this course and of the VITA program, i.e., it doesn't work if you don't show up! Therefore, you are expected to be present at the UTEP VITA site every week that we meet. Further, you must be present for an average *minimum* of 3 hours per week. This means that if you cannot attend a certain week for a previously excused reason, you should make up the hours missed on different weeks (e.g., come early and stay longer) to maintain the minimum average hours for the semester. If you cannot attend for *any* reason, please communicate with me the reason for your absence *before* the absence. Unexplained absences and tardiness will result in a reduction of your class attendance points.

UTEP VITA site operating days and hours can be found on the course calendar on the last page of this syllabus.

Significant Impressions Paper (30 points)

At the conclusion of the tax season and VITA program, you are required to write and submit a Significant Impressions Paper, in which you should describe your take-away from this volunteer experience.

I suggest you keep a journal throughout the semester, and track particular experiences that you encounter as significant or noteworthy each day, including technical as well as "soft-skills" experiences. For example, this might include experiences in learning the software, dealing with a particular tax deduction new to you that you learned as a result of this program, the number of returns you helped prepare, and your interactions with the community members you helped (without disclosing their names or information, of course!).

I will evaluate the paper based on the following:

- The paper must be written in a thoughtful manner, to let me know that your experience and what you got from it were unique. In other words, I don't want to see vague descriptions of the program, such that all student papers start to look the same. Personal anecdotes relating to the class experience will enhance a student's paper. (50%)
- The paper must be professionally written as well. Therefore, it is important that the ideas in your paper are well-organized, the paper reads cohesively, and is *proofread* and free of grammatical errors. (40%)
- While there are no page-limit restrictions, I expect to receive papers anywhere from 3 to 6 pages. What matters is not the length, but again, the content and whether you can thoughtfully and professionally express to me what you learned during the semester. (10%)

Discretionary Evaluation (10 points)

At the end of the course, I will evaluate each student holistically, based on my impressions of the student during the entirety of the course. For example, this evaluation will consider whether you were on time, whether you were professional in interacting with the community members, whether you went beyond expectations in resolving a tax question or issue, whether you were enthusiastic, etc.

Modifications to the syllabus, schedule, or course requirements will be announced in class and/or through email. ***You have the responsibility to be aware of such changes by attending class and checking your email regularly.***

REMINDER:

In this VITA program and in the community as a whole, *you* are the face of UTEP.
Please make us proud!

**VITA Course Calendar
Spring 2020 (for 2019 Tax Year)**

Week	Date	Day	Time	Activity	Location	
0	1/13/2020 - 1/15/2020	M-W	9:00 - 1:00	Basic and Advanced Training - MANDATORY	CALC Lab 2, Room 310	
1	1/20/2020 - 1/24/2020	M-F	NA	Complete and Pass Online BASIC and ADVANCED Certification Exam (on your own time)	NA	
	1/25/2020	Saturday	11:00 - ?	Pre-VITA Program Day (Practice run! Plan setup, check logins, final questions, etc.)	UTEP University Library	
2	1/27/2020 - 1/31/2020	M-F	NA	Complete and Pass Online BASIC and ADVANCED Certification Exam (on your own time)	NA	
	<u>2/1/2020</u>	Saturday	11:00 - 3:00	VITA Program (students 10:30 am – 3:30 pm)	UTEP University Library Blumberg Auditorium 1900 Wiggins Way El Paso, Texas 79968	
3	2/8/2020	Saturday	11:00 - 3:00	VITA Program (students 10:30 am – 3:30 pm)	↓	
4	2/15/2020	Saturday	11:00 - 3:00	VITA Program (students 10:30 am – 3:30 pm)		
5	2/22/2020	Saturday	11:00 - 3:00	VITA Program (students 10:30 am – 3:30 pm)		
6	2/29/2020	Saturday	11:00 - 3:00	VITA Program (students 10:30 am – 3:30 pm)		
7	3/7/2020	Saturday	TBD	Foreign Scholar/1040NR Training		TBD
8	3/9/2020 - 3/13/2020	M-F	NA	Complete and Pass Online FOREIGN SCHOLAR Certification Exam (on your own time)		NA
	3/14/2020 - Spring Break Begins - NO MEETING					
9	3/16/2020 - 3/20/2020	M-F	NA	Complete and Pass Online FOREIGN SCHOLAR Certification Exam (on your own time)	NA	
	<u>3/21/2020</u>	Saturday	11:00 - 3:00	VITA Program - FOREIGN SCHOLARS ONLY (students 10:30 am – 3:30 pm)	UTEP College of Business Administration (Rim Road) Room BUSN 330 El Paso, Texas 79968	
10	3/28/2020	Saturday	11:00 - 3:00	VITA Program - FOREIGN SCHOLARS ONLY (students 10:30 am – 3:30 pm)	UTEP University Library Blumberg Auditorium 1900 Wiggins Way El Paso, Texas 79968	
11	4/4/2020	Saturday	11:00 - 3:00	VITA Program - FOREIGN SCHOLARS ONLY (students 10:30 am – 3:30 pm)	UTEP College of Business Administration (Rim Road) Room BUSN 330 El Paso, Texas 79968	
12	4/11/2020	Saturday	11:00 - 3:00	VITA Program - FOREIGN SCHOLARS ONLY (students 10:30 am – 3:30 pm)	UTEP University Library Blumberg Auditorium 1900 Wiggins Way El Paso, Texas 79968	
13	4/19/2020	Sunday	by midnight	Submit Significant Impressions Paper via email (rperez43@utep.edu)	NA	
14					Open	NA
15					Open	NA

Underlined dates in red indicate certifications must be complete by this date.