

Accounting 4398
Independent Study - VITA Program Practicum
College of Business Administration
University of Texas at El Paso
Spring 2018

Instructor Contact Information

Instructor: Dr. Rebeca Pérez, Ph.D., Assistant Professor of Accounting
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Office Hours: Friday 10:00 am – 12:00 pm, or by appointment

Course Materials

Laptop Computer: There may be instances in which the computers provided in the facility are limited, thus, you may be asked to volunteer to use your own laptop computer on an as-needed basis.

Pre-requisites

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

Your final letter grade will be based on the following items (weighted as follows):

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

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|------------------------------|-------------------|
| Total Possible Points | 100 points |
|------------------------------|-------------------|

Certification Training and Certification Tests (30 points)

For this course, you must pass the *basic* and *advanced* IRS certification online tests. To prepare you for the tests, you must attend the certification training offered as part of this course, either during the early November 2017 training *or* the early January 2018 training.

November 2017 Certification Training Dates:

- Wednesday, November 8 (1:30 pm - 2:30 pm) – Tax Workshop
- Saturday, November 11 (12:00 pm - 4:00 pm) – VITA Training (continuation)
- Wednesday, November 15 (1:30 pm - 2:30 pm) – Tax Workshop
- Friday, November 17 (3:00 pm - 5:00 pm) – VITA Training (continuation)
- Saturday, November 18 (1:00 pm - 4:00 pm) – VITA Training (completion)

January 2018 Certification Training Dates:

- Monday, January 8th – Friday, January 12th (9:00 am - 1:00 pm)

Attendance (Volunteer Hours) (30 points)

Your presence and your time is 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. Further, you must be present for an average *minimum* of 3 hours per week. This means that if you cannot attend a certain week, you should make up the hours missed on a different week (e.g., stay for 6 hours) to maintain the minimum average hours for the semester. If you cannot attend for *any* reason, please communicate with me (e.g., email) 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.
- 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 proof-read and free of grammatical errors.

- 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.

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 based on the hours you said you'd attend, 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 Blackboard. *You have the responsibility to be aware of such changes by attending class and checking Blackboard regularly.*

REMINDER:

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

Course Calendar

| Week | Date | Day | Time | Activity | Location |
|------|--|----------|--------------|---|---|
| 0 | 1/8/2018 - 1/11/2018 | M-Th | 9:00 - 1:00 | Basic and Advanced Training - MANDATORY | COBA CALC Lab, Lab #2 |
| | 1/12/2018 | Friday | 9:00 - 1:00 | Additional practice time and/or exam time - OPTIONAL | COBA CALC Lab, Lab #2 |
| 1 | 1/16/2018 - 1/19/2018 | M-F | NA | Complete and Pass Online BASIC and ADVANCED Certification Exam (on your own time) | NA |
| | 1/19/2018 | Friday | 10:00 - TBD | Pre-VITA Program Day (Practice run! Setup, logins, final questions, etc.) | Boquillas Hall - 3490 Sun Bowl Drive, 79902 |
| 2 | 1/22/18 - 1/26/18 | M-F | NA | Complete and Pass Online BASIC and ADVANCED Certification Exam (on your own time) | NA |
| | 1/27/2018 | Saturday | 10:00 - 4:00 | VITA Program | Boquillas Hall - 3490 Sun Bowl Drive, 79902 |
| 3 | 2/3/2018 | Saturday | 10:00 - 4:00 | VITA Program | Boquillas Hall - 3490 Sun Bowl Drive, 79902 |
| 4 | 2/10/2018 | Saturday | 10:00 - 4:00 | VITA Program | Boquillas Hall - 3490 Sun Bowl Drive, 79902 |
| 5 | 2/17/2018 | Saturday | 10:00 - 4:00 | Foreign Scholar Training (VITA Site Closed) | COBA CALC Lab, Lab #TBD |
| 6 | 2/24/2018 | Saturday | 10:00 - 4:00 | VITA Program | Boquillas Hall - 3490 Sun Bowl Drive, 79902 |
| 7 | 3/3/2018 | Saturday | 10:00 - 4:00 | VITA Program | Boquillas Hall - 3490 Sun Bowl Drive, 79902 |
| 8 | 3/10/2018 Site Closed - Spring Break Begins - No meeting | | | | |
| 9 | 3/17/2018 | Saturday | 10:00 - 4:00 | VITA Program | Boquillas Hall - 3490 Sun Bowl Drive, 79902 |
| 10 | 3/24/2018 | Saturday | 10:00 - 4:00 | VITA Program | Boquillas Hall - 3490 Sun Bowl Drive, 79902 |
| 11 | 3/31/2018 Site Closed - Easter Weekend - No Meeting | | | | |
| 12 | 4/7/2018 | Saturday | 10:00 - 4:00 | VITA Program | Boquillas Hall - 3490 Sun Bowl Drive, 79902 |
| 13 | 4/14/2018 | Saturday | 10:00 - 4:00 | VITA Program | Boquillas Hall - 3490 Sun Bowl Drive, 79902 |
| 14 | 4/21/2018 | Saturday | by midnight | Submit Significant Impressions Paper via email (rperez43@utep.edu) | NA |
| 15 | Open | | | | NA |
| 16 | Open | | | | NA |

