



C.A.S.H. Tax Season Training for 2010

Dear C.A.S.H. Volunteers,

Thank you for generously donating your time and talents to help improve the financial well-being of low income working families in our community. The goal of **C.A.S.H. Tax Season Training** is to prepare every volunteer for whatever role(s) he /shehas chosen within our program.

We offer an extensive list of training options. Please take the time to review all of the options described on the following pages and register on-line using www.cash.volunteerhub.com . Please register as soon as possible. Classes fill-up quickly.

Please consider becoming trained in more than one position. We know that cross trained volunteers experience a very high degree of satisfaction, and they are invaluable when flexibility is needed at C.A.S.H. sites.

Again, thank you for joining us in creating assets, savings and hope for working families in our community. Please feel free to contact Berta Rivera, C.A.S.H. Volunteer and Outreach Manager, at brivera@empirejustice.org or (585) 295-5733, or me at reygabroad@empirejustice.org or (585) 295-5732, if you have any questions.

Sincerely yours,

Rita Eygabroad

Rita Eygabroad
C.A.S.H. Director



C.A.S.H. Tax Season Training for 2010

TABLE OF CONTENTS

Registering for Training	page 2
Summary of Training Requirements	page 2
Volunteer Orientation	page 3
Front Desk Management Training	page 4
C.A.S.H. Advisor Training	page 5
Tax Preparer Training	pages 6-14
Overview including Link and Learn	pages 6-7
Basic Tax Prep	pages 7-9
Refresher Tax Prep	page 10
Refresher with Quality Review	page 11
Link and Learn (I.R.S. online training)	page 12-13
Practice/Extra Test Times	page 14



C.A.S.H. Tax Season Training for 2010

REGISTERING FOR TRAINING

On-Line Course Registration (NEW for 2010)

To register for training, please go to www.cash.volunteerhub.com or contact Marlene Cortés at mcortés@empirejustice.org or 295-5805. If a course meets more than once, please be sure to register for every session (“event”).

SUMMARY OF TRAINING REQUIREMENTS

Volunteer Role	Experience Level	Required Training	Optional Training
All Volunteers	New	Volunteer Orientation	
	Returning		Volunteer Orientation
Front Desk Manager	New & Returning	Front Desk Manager	
C.A.S.H. Advisor	New	C.A.S.H. Advisor Intro	
	Returning	C.A.S.H. Advisor Refresher	
Tax Preparer	New	Basic Tax Prep Training	Advanced Topics Practice/Extra Test Time
	Returning	Refresher Tax Prep Training Or Link & Learn	Advanced Topics Practice/Extra Test Time
Quality Reviewer (Only Returning Tax Prep Vols.)	Returning	Refresher w/Quality Review OR Link & Learn w/Quality Review	Advanced Topics Practice/Extra Test Time

- Returning volunteers are welcome to take Basic or Intro courses rather than Refreshers.
- All volunteers, especially returning volunteers, are encouraged to complete training in more than one role.
- All training materials and reference documents will be provided.
- Due to funding constraints, we will only be able to offer refreshments at sessions that are 4 hours or more. You are welcome to bring your own refreshments to have during a break.



C.A.S.H. Tax Season Training for 2010

VOLUNTEER ORIENTATION TRAINING

Attendance is required for all new C.A.S.H. volunteers. Returning volunteers are welcome.

C.A.S.H. is about more than preparing tax returns. Orientation provides an introduction to C.A.S.H. mission and goals, an overview of what happens at a C.A.S.H. site, expectations of volunteers, and review of the training program. It's a time to meet site managers and experienced volunteers. This is also a great opportunity for returning volunteers to "meet and greet" old friends and get re-acquainted with C.A.S.H. Each session will last about 90 minutes.

For those who are unable to make one of the sessions below, Volunteer Orientation will also be available on-line. Please check www.empirejustice.org/cash for availability and certification procedures.

Note: If you attended an outreach meeting where orientation material was covered, you are welcome, but excused from attending Volunteer Orientation.

Please choose one session:

Vol Orientation 1	Wed, Nov 4	5:30 - 7:30 PM	United Way, 75 College Ave
Vol Orientation 2	Thurs, Dec 3	12 – 2 PM	United Way, 75 College Ave
Vol Orientation 3	Sat, Jan 9	10 – 12 PM	Red Cross Training, 65 College Ave

College Ave. runs between Prince St. and N. Goodman St., one block north of University Ave. (behind the Memorial Art Gallery), and one block south of Main St. (behind the Auditorium Theater).



C.A.S.H. Tax Season Training for 2010

FRONT DESK MANAGEMENT TRAINING

Attendance is required for both new and returning Front Desk Managers (FDM).

A well-run front desk is essential to a smoothly operating site. This 2-hour training session will include computerized appointment scheduling, coordinating appointments with clients who walk-in, greeting techniques, C.A.S.H. program updates, and frequently asked questions. There will be opportunities to engage in role play. The sharing of best practices by experienced, returning volunteers will be greatly appreciated.

Location for all FDM Training: United Way of Greater Rochester, 75 College Ave.

College Ave. runs between Prince St. and N. Goodman St., one block north of University Ave. (behind the Memorial Art Gallery), and one block south of Main St. (behind the Auditorium Theater).

Please choose one session:

FDM 1	Saturday, January 9	12:30 PM-2:30 PM
FDM 2	Wednesday, January 13	5:30 PM-7:30 PM
FDM 3	Saturday, January 23	9:00 AM-11:00 AM



C.A.S.H. Tax Season Training for 2010

C.A.S.H. ADVISOR TRAINING

The mission of C.A.S.H. is to provide opportunities for low-income working people to “get, keep and grow their money.” C.A.S.H. Advisors [CA] play a pivotal role in connecting C.A.S.H. clients to these opportunities.

Location for all CA Training: United Way of Greater Rochester, 75 College Ave.

College Ave. runs between Prince St. and N. Goodman St., one block north of University Ave. (behind the Memorial Art Gallery), and one block south of Main St. (behind the Auditorium Theater).

- C.A.S.H. Advisor Introduction

Attendance is required for all new C.A.S.H. Advisors. Returning CAs are welcome.

This 4-hour class will cover all the tools necessary to be an effective C.A.S.H. Advisor. Topics include: the C.A.S.H. Advisor Conversation, community resources and services, helping clients access their credit report, and options for banking and saving. The class includes time for role play.

Please choose one session

CA Intro 1	Thursday, January 7	1 PM - 5 PM
CA Intro 2	Saturday, January 9	12:30 PM - 4:30 PM
CA Intro 3	Tuesday, January 12	5:30 PM - 9:30 PM
CA Intro 4	Wednesday, January 20	9 AM - 1 PM
CA Intro 5	Saturday, January 23	9 AM - 1 PM

- C.A.S.H. Advisor Refresher

Attendance is required for all returning C.A.S.H. Advisors.

This 2-hour course will serve as a refresher for returning volunteers. There will be updates regarding community resources, asset building programs, and other new developments. There will be time to share common experiences and successes.

Please choose one session

CA Refresher 1	Tuesday, January 5	5:30 PM –7:30 PM
CA Refresher 2	Saturday, January 9	3 PM - 5 PM
CA Refresher 3	Thursday, January 14	10 AM - 12 PM
CA Refresher 4	Saturday, January 23	12 PM - 2 PM



C.A.S.H. Tax Season Training for 2010

TAX PREPARER TRAINING

Volunteers are trained according to IRS standards to prepare complete and accurate tax returns with a focus on regulations related to low income workers. Our goal is to assure that every client takes full advantage of the tax credits and benefits for which he/she is eligible. All returns are prepared using commercial software (TaxWise) that is provided by the IRS. Tax law is taught along with tax preparation software training. Reference materials will be provided. All C.A.S.H. volunteer tax preparers (returning, as well as new volunteers) must pass the IRS certification test at both the Basic and Intermediate levels. Each course schedule includes time for the test.

Location for Tax Preparation Training: Computer labs (Rooms 5006, 5007 and 5008) of the Damon City Campus of Monroe Community College, located on the fifth floor of the former Sibley's Building, at the corner of E. Main St. and S. Clinton Ave. in Downtown Rochester. Parking is available in the adjoining St. Joseph's garage which is accessible from South Clinton Avenue or Pleasant Street. Volunteers' parking tickets from the St. Joseph's garage will be validated. Bring your parking ticket to class and ask your instructor to stamp it to obtain free parking.

Classes fill up quickly; please enroll early so we can accommodate everyone in a small class.

If you are unsure about which course you should take, please contact our Training Manager, Sonya Christensen, at 544-8573.

Tax Preparation – Basic

Attendance is required for all new Tax Preparers. Returning Tax Preparers are welcome.

This 16 hour course teaches volunteers all aspects of federal and NY state tax preparation for the low income filer. Volunteers should be comfortable with computers and have prepared 1040s previously. The last session of the class will be the I.R.S. test (Basic and Intermediate certification).

All tax preparation volunteers are encouraged to use the I.R.S. **Link and Learn** interactive tax course. If you have NEVER prepared a 1040 tax return, please go to the I.R.S. website and complete online **Link and Learn Basic Module** through the section on Income before coming to your C.A.S.H. course.



C.A.S.H. Tax Season Training for 2010

All tax preparation volunteers are encouraged to use the I.R.S. **Link and Learn Taxes**, an online course. 1) Go to www.irs.gov and type “link and learn taxes” in the search box.

- 2) Click on the first result. 3) Then click on Link and Learn Taxes again in the text.
- 4) At the “Welcome to Link and Learn Taxes” screen, click on the BASIC button.
- 5) Then click on the link Start Basic Course that is just below the BASIC button.
- 6) Follow the directions and the options until you have finished the section(s) you need. **The 2009 course should be online after Nov. 13.** You may also complete the Intermediate section or even the Advanced one if you wish.

If all you want to do is get the information from Link and Learn, no user ID or password is needed. If you would like to use the software in the PRACTICE LAB to do some tax returns or take the I.R.S. test, it is a little more complicated. Complete directions are given in the Link and Learn Course description on pages 11-12.

The I.R.S. website has the most complete and up to date information on all tax topics. Once at the site, click on the box near the top that says “Tax Professionals.” Type in any topic and get detailed information. Also in the Tax Professional sections on the left side of the page under IRS Resources, there is a link for Forms and Publications. Type in the name, number or topic and the whole form or publication will be downloaded. **This can be very helpful.**

Basic Schedule

Choose a four session block. When you schedule your training via cash.volunteerhub.com you must sign-up for each session within the block you choose.

Course #	Dates & Time	Location
Basic A	Monday, January 4, 2010 1-5 pm	Damon 5008
	Wednesday, January 6, 2010 1-5pm	Damon 5008
	Monday, January 11, 2010 1-5pm	Damon 5008
	Wednesday, January 13, 2010 1-5pm	Damon 5008
Basic B	Tuesday, January 12 8:30am-12:30 pm	Damon 5006
	Tuesday, January 19 8:30am-12:30 pm	Damon 5006
	Thursday, January 21 8:30am-12:30 pm	Damon 5006
	Friday, January 22 8:30am-12:30 pm	Damon 5006



C.A.S.H. Tax Season Training for 2010

Basic C	Friday, January 8 1-5 pm	Damon 5008
	Friday, January 15 1-5 pm	Damon 5008
	Wednesday, January 20 1-5 pm	Damon 5008
	Friday, January 22 1-5 pm	Damon 5008
Basic D	Tuesday, January 5 5:30-9:30 pm	Damon 5008
	Thursday, January 14 5:30-9:30 pm	Damon 5008
	Tuesday, January 19 5:30-9:30 pm	Damon 5008
	Thursday, January 21 5:30-9:30 pm	Damon 5008
Basic E	Friday, January 8 1-5 pm	Damon 5006
	Friday, January 15 1-5 pm	Damon 5006
	Thursday, January 21 1-5 pm	Damon 5006
	Friday, January 22 1-5 pm	Damon 5006
Basic F	Friday, January 8 8:30am-12:30 pm	Damon 5008
	Friday, January 15 8:30am-12:30 pm	Damon 5008
	Friday, January 22 8:30am-12:30 pm	Damon 5008
	Saturday, January 23 8:30am-12:30 pm	Damon 5008
Basic G	Monday, January 11 8:30am-12:30 pm	Damon 5008
	Wednesday, January 13 8:30am-12:30 pm	Damon 5008
	Monday, January 18 8:30am-12:30 pm	Damon 5008
	Wednesday, January 20 8:30am-12:30 pm	Damon 5008
Basic H	Monday, January 11 5:30-9:30 pm	Damon 5008
	Wednesday, January 13 5:30-9:30 pm	Damon 5008
	Monday, January 18 5:30-9:30 pm	Damon 5008
	Wednesday, January 20 5:30-9:30 pm	Damon 5008
Basic J	Monday, January 11 8:30am-12:30 pm	Damon 5007
	Wednesday, January 13 8:30am-12:30 pm	Damon 5007
	Monday, January 18 8:30am-12:30 pm	Damon 5007
	Wednesday, January 20 8:30am-12:30 pm	Damon 5007
Basic K	Monday, January 4 5:30-9:30 pm	Damon 5007
	Wednesday, January 6 5:30-9:30 pm	Damon 5007
	Monday, January 11 5:30-9:30 pm	Damon 5007
	Wednesday, January 13 5:30-9:30 pm	Damon 5007



C.A.S.H. Tax Season Training for 2010

Basic L	Tuesday, January 12 8:30am-12:30 pm	Damon 5007
	Tuesday, January 19 8:30am-12:30 pm	Damon 5007
	Thursday, January 21 8:30am-12:30 pm	Damon 5007
	Saturday, January 23 8:30am-12:30 pm	Damon 5006**
Basic M	Saturday, January 9 8:30am-12:30 pm	Damon 5007
	Saturday, January 16 8:30am-12:30 pm	Damon 5007
	Friday, January 22 8:30am-12:30pm	Damon 5007
	Saturday, January 23 8:30am-12:30 pm	Damon 5007
Basic N	Monday, January 11 1-5 pm	Damon 5007
	Wednesday, January 13 1-5 pm	Damon 5007
	Tuesday, January 19 1-5 pm	Damon 5007
	Thursday, January 21 1-5 pm	Damon 5007
Basic X	Monday, January 25 5:30-9:30 pm	Damon 5008
	Tuesday, January 26 5:30-9:30 pm	Damon 5008
	Wednesday, January 27 5:30-9:30 pm	Damon 5008
	Thursday, January 28 5:30-9:30 pm	Damon 5008
Basic MCC – MCC Students ONLY		
	Monday, February 1, 2010 5:30 - 9:30 pm	Damon 5007
	Tuesday, February 2, 2010 5:30 - 9:30 pm	Damon 5007
	Wed., February 3, 2010 5:30 - 9:30 pm	Damon 5007
	Thursday, February 4, 2010 5:30 - 9:30 pm	Damon 5007

** Note room change for session



C.A.S.H. Tax Season Training for 2010

Tax Preparation – Refresher

Attendance is required for all returning Tax Preparers.

It is also available for professional tax preparers. There will be a review of TaxWise software, a review of basic tax concepts, practice tax returns, some problem solving, and information on what's new for 2010. The IRS certification test will be administered in the second session.

Choose a two session block. When you schedule your training via cash.volunteerhub.com you must sign-up for each session within the block you choose.

Refresher 1	Monday, January 4	5:30-9:30 PM	Damon 5008
	Wednesday, January 6	5:30-9:30 PM	Damon 5008
Refresher 2	Thursday, January 7	5:30-9:30 PM	Damon 5008
	Thursday, January 14	5:30-9:30 PM	Damon 5007*
Refresher 3	Saturday, January 9	8:30 AM-12:30 PM	Damon 5008
	Saturday, January 16	8:30 AM-12:30 PM	Damon 5008
Refresher 4	Friday, January 15	1-5 PM	Damon 5007
	Friday, January 22,	1-5 PM	Damon 5007
Refresher 5	Wednesday, January 6	8:30 AM-12:30 PM	Damon 5007
	Friday, January 15	8:30 AM-12:30 PM	Damon 5006*
Refresher 6	Tuesday, January 19	8:30 AM-12:30 PM	Damon 5008
	Thursday, January 21	8:30 AM-12:30 PM	Damon 5008

**Note different room for second session



C.A.S.H. Tax Season Training for 2010

Tax Preparation - Refresher w/ Quality Review

Alternative Refresher training for returning tax preparers interested in Quality Review training

In addition to all of the refresher class, this five hour class will contain a section on quality review procedures and tips. Participants will do several reviews of tax returns with errors to learn all the aspects of quality reviewing at our sites. **This is for experienced tax preparer volunteers only.** The IRS certification test will so be administered in the second 4-hour session.

Choose a two session block (when you schedule your training via cash.volunteerhub.com you must sign-up for each session within the block you choose):

Refresher QR 1	Friday, January 8	8:30 AM-1:30 PM	Damon 5007
	Friday, January 15	8:30 AM-12:30 PM	Damon 5007
Refresher QR 2	Saturday, January 9	8:30 AM-1:30 PM	Damon 5006
	Saturday, January 16	8:30 AM-12:30 PM	Damon 5006
Refresher QR3	Tuesday, January 19	4:30-9:30 PM	Damon 5006
	Thursday, January 21	5:30-9:30 PM	Damon 5006
Refresher QR4	Monday, January 18	1 - 6 PM	Damon 5007
	Wednesday, January 20	1 - 5 PM	Damon 5007



C.A.S.H. Tax Season Training for 2010

Link and Learn

Are you a returning tax preparer who would like to review the I.R.S. materials and take the I.R.S. test on your own time? Returning volunteers can do this using the online IRS Link and Learn option. You will then only need to complete a 2 hour C.A.S.H. course designed to update you on what's new at C.A.S.H. and with New York State law. **To be admitted to the class, volunteers must bring certification that they have passed the tests for the basic and intermediate Link and Learn modules.**

Contact Berta Rivera (295-5733) or BRivera@empirejustice.org to get your printed I.R.S. materials, the test booklet and the C.A.S.H. Red Book. Once you have these

- 1) Go to www.irs.gov and type "link and learn taxes" in the search box.
- 2) Click on the first result.
- 3) Then click on Link and Learn Taxes again in the text.
- 4) At the "Welcome to Link and Learn Taxes" screen, find the purple link Click here to take the Returning Student Course.
5. Complete the returning student Basic and Intermediate Courses. **Make sure it is the 2009 version which is scheduled to be online after Nov.13.** No user ID or password is needed to just get the information.

To do practice returns or take the test, the Practice Lab will be needed and it is a little cumbersome to use. **Print these directions before starting if you do not already have a User ID and password for the Practice Lab as they are a little complicated..**

Follow steps 1-3 above. At Welcome to Link and Learn Taxes, click on the BASIC button. At the next screen, click on Start the Basic Course. You will see an outline of the Basic course. There will be an ICON for the Practice Lab on the right side of the screen. Click on it. Then click on the tab on the next screen that says "Leave the IRS Site."

You will see a screen that says "Create an Account." Complete the screen, then click to register. **WRITE DOWN YOUR LOGIN AND PASSWORD** as you will need them each time you sign in and/or to take your test. Then click on the practice lab link and it will ask you for the password you received from your site coordinator. This universal password is **learntwo** Enter it and click login. At the next screen, Click the "Create New User" button. At the next screen enter your zip code and if you have an email address or not. The click "CREATE USER ID."

The system will generate a 5 digit number that will be used to enter the practice lab. **PRINT THIS AND WRITE DOWN THIS USER ID NUMBER** as it cannot be retrieved and you need it each time you log into the practice lab. You will also need the **learntwo** password each time. This user ID will replace the XXX's for the identification numbers in the Workbook (4491-X) and test scenarios. If you lose it, it is lost and you will have to create a new one.



C.A.S.H. Tax Season Training for 2010

Use the practice lab for practicing doing returns. It is the online version of the TaxWise software that we use. It can be a little slow and frustrating. You could also use other free tax software like TurboTax or Taxact or RapidTax if you download them to your own computer. Or you could do returns by hand.

If you choose to take the test online you must use the Practice Lab Software to enter you test results Be aware that the questions in the Practice Lab may not match the questions in your test book exactly. Allow extra time for this or answer the questions in the Retest version also as they will be alternated online. **You must pass the Basic and Intermediate test and bring your certificate to be admitted to the Link and Learn class.** If you have questions or problems, please contact our Training Director, Sonya Christensen at 544-8573 or sonyac218@gmail.com.

Link and Learn Schedule

Link Learn 1	Monday, January 18	7-9 PM	Damon 5007
Link & Learn 2 with QR	Wednesday, January 20	8:30-11:30 AM	Damon 5006

Advanced Tax Preparation Topics

These optional topics cover complex tax situations for volunteer tax preparers who wish to sharpen their skills and increase their knowledge.

Choose one session for whichever topic you wish to attend:

Advanced Topics A: New York State topics including IT2114, the Empire State Child Tax Credit, also Injured Spouse, Small Businesses, TaxWise tips and general Q&A.

Adv Topics A1	Saturday, January 16	1-3 pm	Irondequoit Super Site*
Adv Topics A2	Thursday, January 21	7-9pm	Damon 5007

Advanced Topics B: Itemized Deductions

Adv Topics B	Tuesday, January 19	7-9 pm	Damon 5007
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***Note** – Irondequoit Super Site Address: 2111 Hudson Ave., Rochester 14617



C.A.S.H. Tax Season Training for 2010

Tax Prep Practice and/or Extra Time to complete the I.R.S. test

Need more time to practice your tax return preparation skills? Do you have some questions that need answering? Want to spend some additional time on test preparation? You have several opportunities to practice and work one on one with an experienced C.A.S.H. volunteer.

All volunteers are welcome. Choose as many sessions as you would like:

Practice/Test Time 1	Saturday, January 9	1-5 PM	Irondequoit Site*
Practice/Test Time 2	Wed, January 13	8:30 AM - 12:30 PM	Damon 5006
Practice/Test Time 3	Thursday, January 14	5:30-9:30 PM	Damon 5006
Practice/Test Time 4	Saturday, January 16	1-5 PM	Irondequoit Site*
Practice/Test Time 5	Monday, January 18	1-5 PM	Damon 5008
Practice/Test Time 6	Saturday, January 23	1-5 PM	Irondequoit Site*
Practice/Test Time 7	Saturday, January 30	1-5 PM	Damon 5008

***Note** – Irondequoit Super Site Address: 2111 Hudson Ave., Rochester 14617