



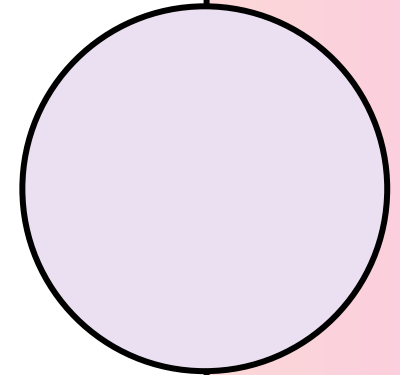
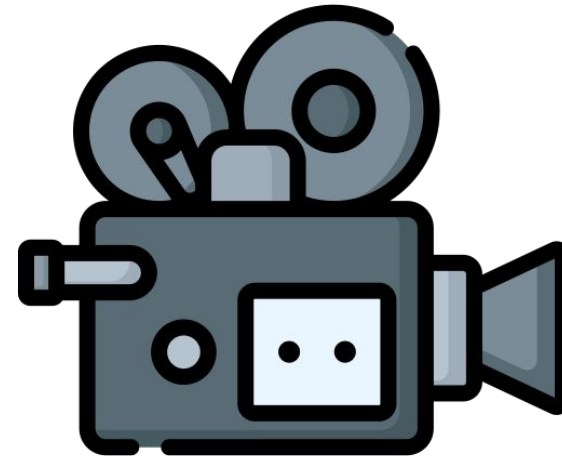
District / Training Coordinator Workshop

TY 2024

Recording Reminder

Before we get started...

- ★ We will be recording this session
 - Recordings emailed out Wed. Nov. 13th
 - Recordings also available on ortaxvolunteers.org
- ★ If you do not want to appear in the recording, feel free to:
 - Turn off your camera
 - Use the chat feature to ask questions





District / Training Coordinator Workshop

TY 2024



Hello! I'm Jo

She/Her/Ella

Program Training Coordinator

MFS CASH Oregon

3rd year developing Moodle

Today's Agenda

Moodle Overview	6
Demonstration	16
Basic Tech Support	19
Creating Groups	32
Training Resources	45
General Q & A	50

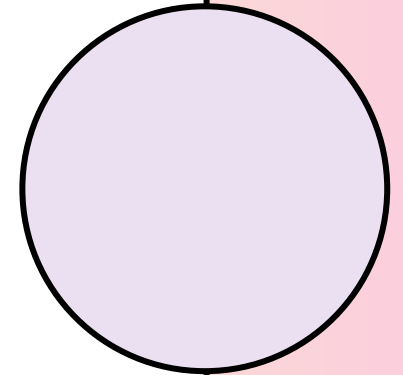
1

Introduction to Moodle

What is Moodle? Why do we use it? What's new this year?

What is Moodle?

- ★ **Online learning platform**
 - Used by many colleges and universities
- ★ Allows for **self-paced learning** through material
 - DCs/TCs can **track volunteer progress**
- ★ Provides volunteers all the knowledge to pass the Advanced Exam
 - Contains info about volunteering
 - Practice **case studies** modeled after those on the exam
 - **Deeper Dives** for experienced volunteers
- ★ **Fifth year** using Moodle!



Introduction to Moodle

- ★ Self-guided, online course
 - Teaches **federal and Oregon tax law**
 - Teaches **TaxSlayer**
 - Teaches tax preparation basics
 - **Encourage volunteers to check with you for site specific policies and plans**
- ★ Various types of activities
 - **Videos**
 - Recommended readings
 - Knowledge checks
 - Links to **IRS publications**
 - **Certification** requirements



“

“This was outstanding. We have nothing like this in GA. I was lucky enough to get access via a friend. You would be doing a great service to volunteers across the country if you could somehow make the course more widely available. There is a lot to learn, and your courses are so helpful. Clearly there are state-specific issues, but that is minor compared to the many benefits of your training on the Fed returns. Thanks very much for your work!”

Moodle Updates

- ★ **New look and feel** to the Moodle site
 - New login page and site home
- ★ Broken into **separate modules**
 - Start Here, one module per case study, Deeper Dives + What's New
 - Only need to self-enroll in ONE module
 - Auto enrolled in the rest
- ★ Streamlined user layout
 - **Moved all Learn More** readings to one section
 - New completion **indicators for videos** - View AND finish
- ★ Intake Interview NOT included in all 5 cases
 - Reduced number of videos

Three Main Sections

Core Training Modules

Designed for new / inexperienced volunteers. One Start Here module, five core case studies modeled after those on the Advanced Exam.

What's New in TY 2024?

Video presentation on any changes for Tax Year 2024 as well as two additional cases using TY 2024 software. These serve as the AARP proficiency problems.

Deeper Dives

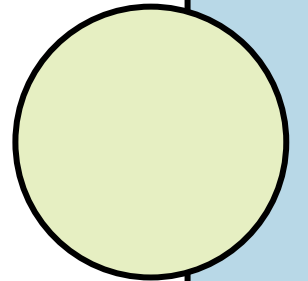
Deeper dives into selected topics to learn more about tricky subjects. Examples include education credits, self-employment, ITINs, complicated dependency and more. Designed for experienced volunteers, and new volunteers looking to learn more.

Tax Return Topics

Matrix

TY 2023-24

*Will be updated with G & H cases when released



Five Core Case Studies (TY 2023)

Anders

Beaux

Castillo Lopez

Davis

Efron

Introduction to
TaxSlayer Practice
Lab

Simple W-2

Additional sources
of income

Marketplace
Health Insurance

ITINs

Introduction to
dependents

Simple
self-employment

Head of
Household

Itemized
deductions

Education credits

Retirement
income

Special Oregon
Medical
Subtraction

These cases use **TY 2023 software** as they are developed before the release of TY 2024 software

Deeper Dives

Trauma Informed
Client
Interactions

Medicaid Waiver
Payments

Capital Gains

ITINs

Self-Employment

Education Credits

Families are
Complicated

LITC Workshops

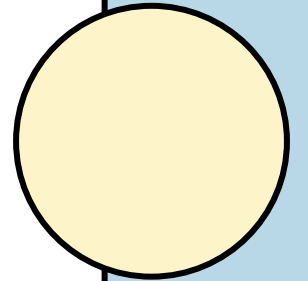
What's New in TY 2024?

Narrated Presentation

- ★ Overview of important changes to tax law, certification and volunteering
- ★ Typically released at the end of December
- ★ Additional module

TY 2024 Case Studies

- ★ Two additional case studies (G&H)
- ★ AARP proficiency problems
- ★ Federal released at the end of December
- ★ Oregon released mid-January
- ★ Posted on ortaxvolunteers.org





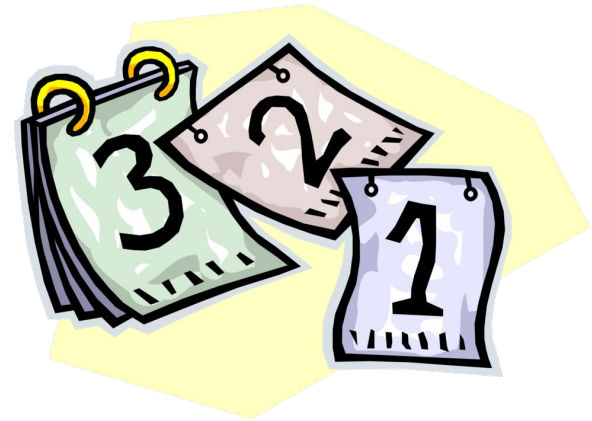
2

Moodle Demonstration

Let's take a look at Moodle!

Moodle Access Year-Round

- ★ Once the course opens, it stays open!
 - Each year's course is open until the next year's course releases
- ★ Use as a resource during tax season
 - **Refresh your knowledge**
 - Take a new deeper dive
- ★ Encourage volunteers to **continue using the course**
 - Lots of great information to learn
 - Training can happen anytime!



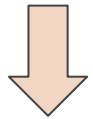
Questions?

3

Basic Tech Support: Accounts & Enrollment

Creating an Account

1. Visit: <https://learn.mfs-cashoregon.org/login/index.php>
2. Click **“Create new account”**
3. Enter a **username** (only lowercase letters allowed)
4. Select a **password** that you will remember
5. Add your own **email address**
 - a. You will need to add your email twice
6. Enter your **first and last name** (can be preferred name)
7. Entering city/town is **optional**
8. Click on blue **“create my new account”** button



Create my new account

Cancel



Log in

Username or email

Password

Log in

[Lost password?](#)

Is this your first time here?

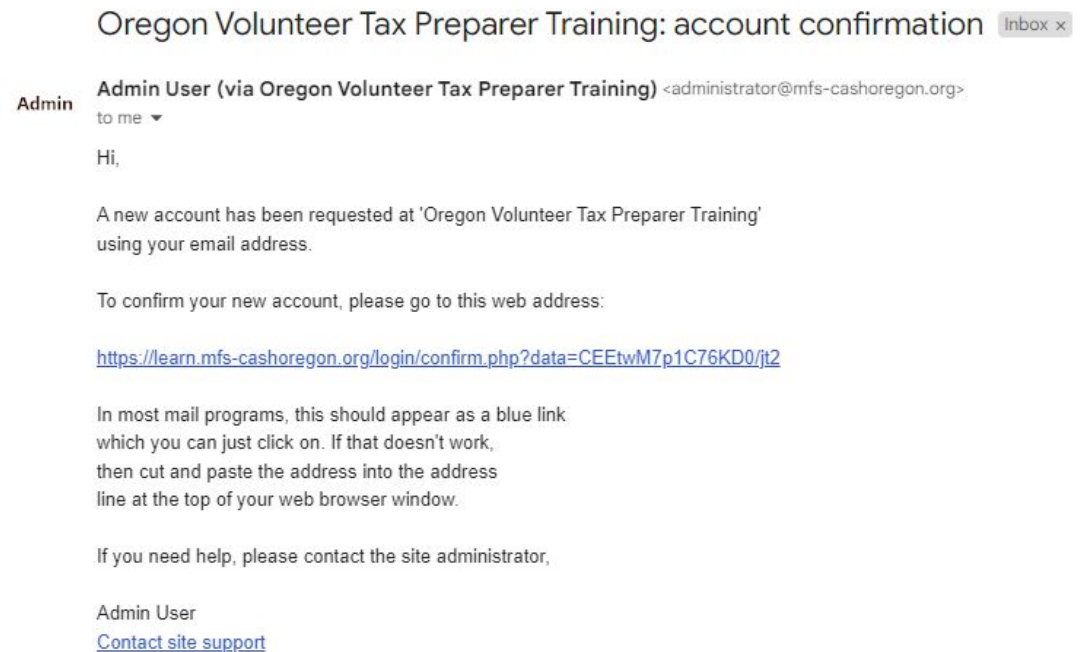
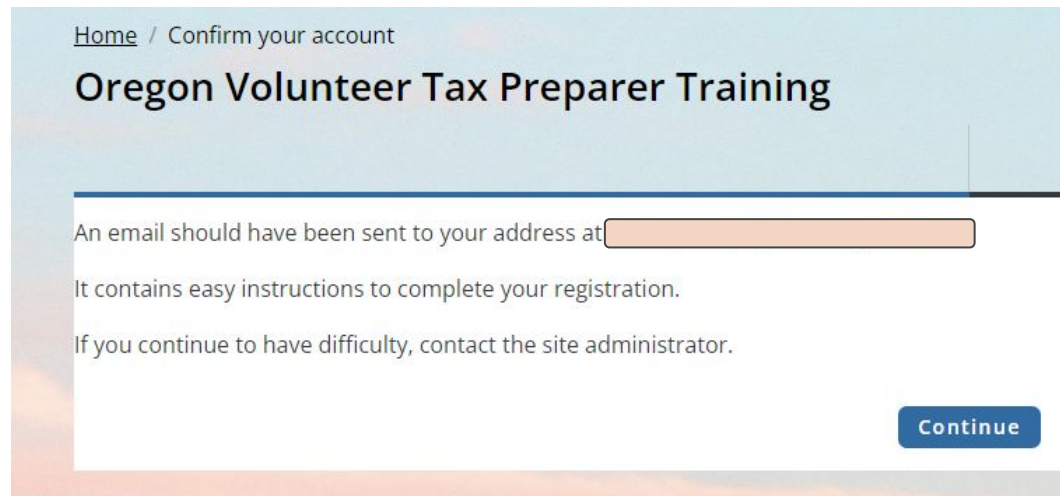
For full access to this site, you first need to create an account.

Create new account

Cookies notice

Confirming Your Account

9. Volunteers will then need to go to their email, and confirm their account
 - a. Be sure to check spam!
10. Follow the link in the email to confirm account



Confirming Your Account

11. After following the link - click on the **white “continue” button**
12. You are now ready to **enroll in training modules!**

[Home](#) / Your registration has been confirmed

Oregon Volunteer Tax Preparer Training

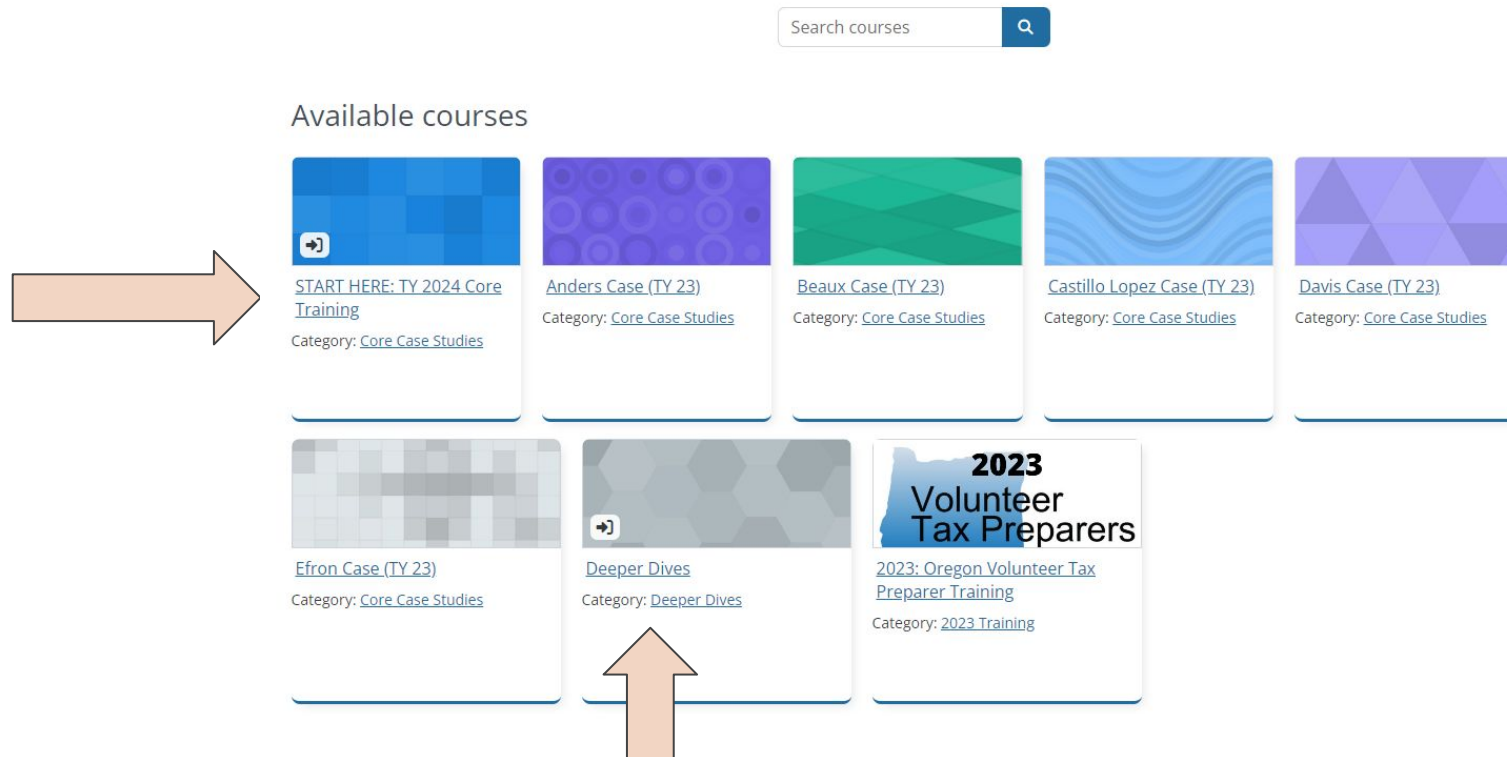
Thanks, Jo Testy#2

Your registration has been confirmed

Continue

Enrolling in Training Modules

1. Once you have created your new Moodle account, you will be directed to a page with all available training modules
2. Click on the **blue link of the desired module** (Start Here, Deeper Dives, What's New)



The screenshot shows a Moodle interface for course selection. At the top, there is a search bar labeled "Search courses" with a magnifying glass icon. Below the search bar, the text "Available courses" is displayed. The courses are presented in a grid of cards. Each card has a colored header, a title, and a category. An orange arrow points to the first card, "START HERE: TY 2024 Core Training", which has a blue header and a small icon of a right-pointing arrow. Another orange arrow points to the "Deeper Dives" card, which has a grey header and a small icon of a right-pointing arrow. The "2023 Volunteer Tax Preparers" card has a blue header with the year "2023" in white. The other cards are "Anders Case (TY 23)", "Beaux Case (TY 23)", "Castillo Lopez Case (TY 23)", "Davis Case (TY 23)", and "Efron Case (TY 23)".

Search courses

Available courses

START HERE: TY 2024 Core Training
Category: [Core Case Studies](#)

Anders Case (TY 23)
Category: [Core Case Studies](#)

Beaux Case (TY 23)
Category: [Core Case Studies](#)

Castillo Lopez Case (TY 23)
Category: [Core Case Studies](#)

Davis Case (TY 23)
Category: [Core Case Studies](#)

Efron Case (TY 23)
Category: [Core Case Studies](#)

Deeper Dives
Category: [Deeper Dives](#)

2023 Volunteer Tax Preparers
2023: Oregon Volunteer Tax Preparer Training
Category: [2023 Training](#)

Enrolling in Training Modules

3. Click on the **blue “enrol me”** button
 - a. NOTE: Moodle uses British English, and therefore only uses one L in enroll

Home / Enrolment options
2023: Oregon Volunteer Tax Preparer Training


Enrolment options

• Course creator: [Jo Tabacek](#)

2023
Volunteer
Tax Preparers

∨ Self enrolment (Volunteer)

No enrolment key required.

 [Enrol me](#)

Enrolling in Training Modules

4. You are now successfully enrolled in your training module!
 - a. **Enrolling in the Start Here module will automatically enroll you in the five core cases**
 - b. All deeper dives are in one module
5. From now on, training modules will appear on your **Dashboard and in My Courses**

[Home](#) / 2023 Training

2023: Oregon Volunteer Tax Preparer Training

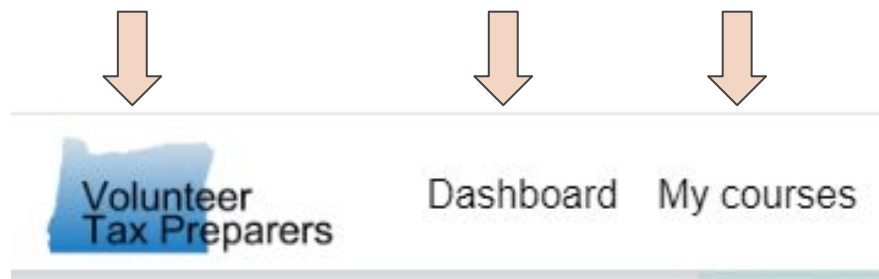
Course Participants Grades Competencies More ▾

You are enrolled in the course. ×

[Collapse all](#)

Starting a Training Module

1. New volunteers should start with the “**START HERE**” training module
2. **Click on the blue link** to access a course
3. ALL volunteers going through core training should **review the Moodle Navigation and Course Overview** videos
 - a. These videos will give an overview of the Moodle training course, and outline how to use the course
 - b. There were lots of changes this year
4. Once inside a training module, you can click on multiple areas to return to see all training modules








A course card with a blue header image. The text on the card reads: "START HERE: TY 2024 Core Training" (with "START HERE" in blue and "TY 2024 Core Training" in black), and "Category: Core Case Studies" (with "Core Case Studies" in blue).

Navigating a Training Module

Course Index

✓ IRS Exams

- ✓  Tips for Navigating th...
- ✓  IRS Exam Tips
- Volunteer Standards of ...
- ✓  VSC Training: Volunt...
- ✓  VSC Exam Question...
-  VSC Exam: Volunte...

Breadcrumbs


[Home](#) / [Core Case Studies](#) /


[START HERE: TY 2024 Core Training](#)

[Moodle Basics & Training Overview](#)

Clickable links located
at the top of the
screen under header

Prev/Next Buttons

◀  2023 - 2024 Tax Topics
Matrix

 Mac - Browser Tips and Tricks
(13:46) ▶

You can also use the
“jump to” drop down
menu

Moving Between Modules

- ★ At the bottom of each core module, you will find a link to the next module

✓ Up Next:

[CLICK HERE to go to the TY 23 Anders Case](#)

If you ever need to return to the Start Here module you can do so through your 'Dashboard' or 'My courses' screens. If you are ready to move on, click here to be taken directly to the TY 23 Anders Case, which is the next step in training. Each training module will have a link at the bottom that will direct you to the next training module.

- ★ You can also navigate between modules using the “Dashboard” & “My Courses”



Dashboard My courses

Forgotten Username or Password

1. Visit: <https://learn.mfs-cashoregon.org/login/index.php>
2. Click the blue “Lost password?” link
 - a. You will need either your username or email address to recover your account
3. Enter either your username or email address and click on the blue “search” button

Search by username

Username



Search

Search by email address

Email address



Search



Log in

Username or email

Password


Log in


[Lost password?](#)



Forgotten Username or Password

4. **Check your email** - including the spam folder!
5. Follow the link to **reset your password**
6. **Save your new login and password** somewhere secure

 **Admin User (via Oregon Volunteer Tax Preparer Training)** <administrator@mfs-casho... 4:51PM (1 minute ago) ☆ ↶ ⋮
to me ▾

Hi Jo, 

A password reset was requested for your account 'jtabacek' at Oregon Volunteer Tax Preparer Training.

To confirm this request, and set a new password for your account, please go to the following web address: https://learn.mfs-cashoregon.org/login/forgot_password.php?token=756WkvSWKiYJQpUQZZxEIBFoBZPoM0Pn
(This link is valid for 30 minutes from the time this reset was first requested.)

If this password reset was not requested by you, no action is needed.

If you need help, please contact the site administrator,
Admin User
[Contact site support](#)

When all else fails...

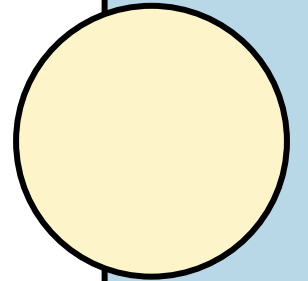
Utilize the various
training
resources!

4

Creating & Tracking Groups in Moodle

Moodle Permissions

- ★ Each of you will be enrolled with:
 - **Non-editing teacher & volunteer permissions**
- ★ You will be able to **create group(s)** for your volunteers
 - EX: District 14
 - EX: CASH Returning Vols.
- ★ Groups **require maintenance!**
 - They do not update automatically
 - When a new volunteer in your district joins, **you need to add them to your group**
- ★ Use groups to **track volunteers progress** through Moodle

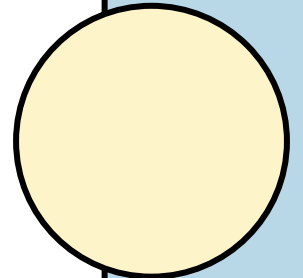


Switching Between Roles

1. Navigate to profile
2. Select "Switch role to"
3. Select desired role
 - a. Non-editing teacher
 - b. Volunteer
4. Follow the same steps to switch back
 - a. Return to my normal role

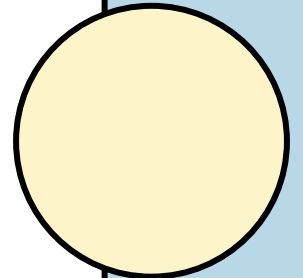
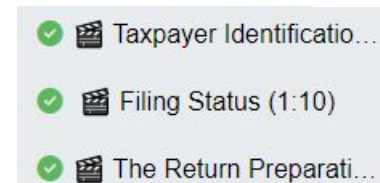
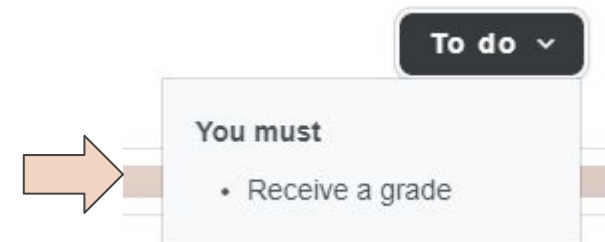
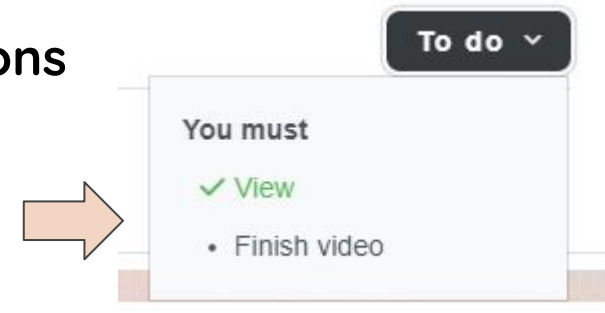


The screenshot shows a user profile page with a navigation menu on the left and a 'Switch role to...' dialog on the right. The navigation menu includes: Profile, Grades, Calendar, Private files, Reports, Switch to companion, Preferences, Switch role to..., and Log out. The 'Switch role to...' dialog is open, showing a list of roles: Manager, Course creator, Teacher, Non-editing teacher, Volunteer, Guest, Authenticated user, and Authenticated user on site home. Below the list is a 'Cancel' link. The current role is 'Volunteer' and the user is 'JT'. A blue button at the bottom of the dialog says 'Return to my normal role'. Two orange arrows point to the 'Non-editing teacher' and 'Volunteer' options in the role list.



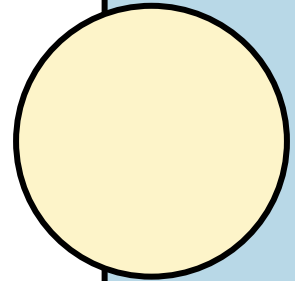
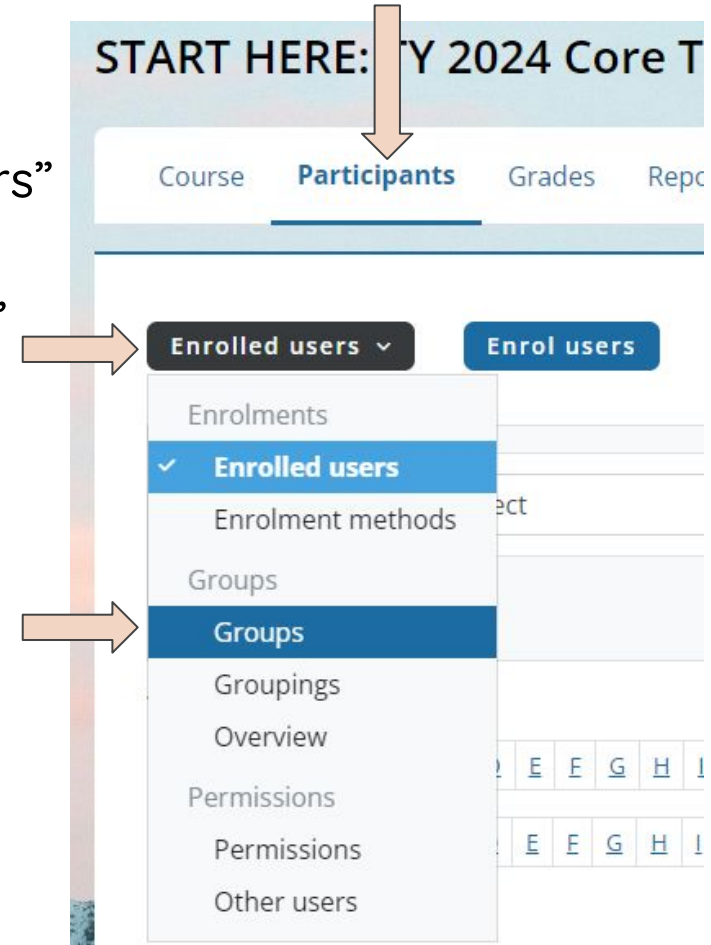
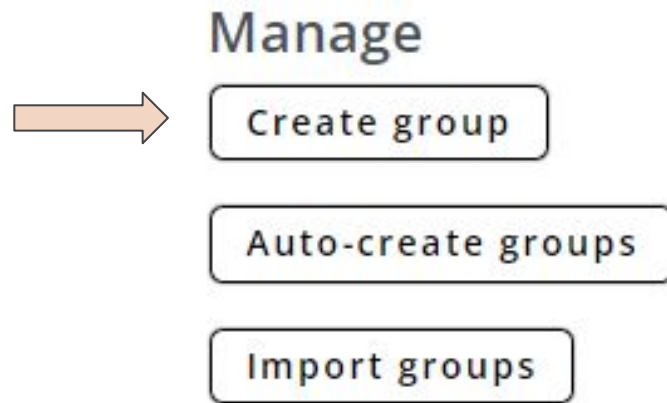
Moodle Activity Completion

- ★ Each activity in Moodle has **completion conditions**
 - **Videos:** Two steps, tracked **automatically**
 - 1 - View
 - 2 - Finish the video
 - **Links:** One step, tracked **automatically**
 - 1 - View
 - **Quizzes:** One step, tracked **automatically**
 - 1 - Receive a grade
- ★ Completed activities will:
 - Change from “to do” to “**done**” on the course homepage
 - Get a **green checkmark** in the course index



Creating Groups

1. Navigate to “Participants” tab within a course
2. Select the dropdown menu listed “Enrolled users”
3. Select “Groups”
4. Scroll down to **Manage** & select “Create group”



Creating Groups

5. Choose a **group name**
6. Set visibility to **“only visible to members”**
7. **Uncheck** “Show group in dropdown”
8. Set **group messaging** to **“No”**
8. Click the blue **“Save changes”** button

Show group in dropdown menu for activities in group mode ?

General

Group name

Enrolment key

Group membership visibility

- Visible
- Only visible to members**
- Only see own membership
- Hidden

 for activities in group mode ?

Group messaging

- No
- No**
- Yes

New picture

Save changes

Adding Volunteers to Groups

1. From the Groups menu, **select your desired group** from the left hand menu
 - a. It will be highlighted blue when it is selected
2. Select **“Add/remove users”** under the right hand menu
3. **Search for users** on the bottom right hand side
4. **Select all desired members** using command or control
5. Click the **“Add”** button to add to your group

Groups ▾

Groups

CASH OR Volunteers (0)

Add/remove users

◀ Add

Volunteer (40)

Lois Andersen (lois.a@...

Rebecca Boley (rebecca.b@...

Estella Casto (estella.c@...

Bob Dahl (dahlb@...

Andrea Dobson (andrea.d@...

Alex Duff (alex.d@...

Lauren Dunnewa (lauren.d@...

Mary Emerson (mary.e@...

Sandra Emmons (sandra.e@...

Keila F (keilaf@...

Wendy Genther (wendy.g@...

Wendy Genther /

Shanthini Kurian (rosamarigold17@gma
 Search Clear

Tracking Group Progress

1. Navigate to the “**Reports**” tab
2. Select “**Activity completion**” from the dropdown menu
3. Select your group from the separate groups dropdown menu
4. Leave other dropdown menus as is (other than **section**, if you want to filter)
5. You can now see only your group’s volunteers!
6. You can **download this report** as a spreadsheet or excel file at the bottom

START HERE: TY 2024 Core Training

Activity completion ▾

Course Participants Grades **Reports** Badges More ▾

Separate groups CASH OR Volunteers ▾

First name All

Last name All

[Download in spreadsheet format \(UTF-8 .csv\)](#)

[Download in Excel-compatible format \(.csv\)](#)

Tracking Group Progress

1. You can also use “Course participation” to track certain activities
 - a. Select the desired **activity**,
 - b. Select **volunteer** for role,
 - c. Select your desired **group**
 - d. Hit the blue “**Go**” button

Course participation ▾

Activity module VSC Exam: Volunteer Standards of Conduct ▾

Volunteer ▾ Show actions All actions ▾ **Go**

Groups CASH OR Volunteers ▾

Tracking Group Progress

1. You can use the course participation to **send a message to volunteers** who have not completed a certain activity (such as the IRS exams)

5 Volunteer

First name / Last name	View	<input type="checkbox"/> Select
Jo Tabacek	Yes (6)	<input type="checkbox"/>
Malik Shaw	No	<input checked="" type="checkbox"/>
Jeff Lauck	No	<input checked="" type="checkbox"/>
Lauren Dunnewald	Yes (3)	<input type="checkbox"/>
Alex Duff	No	<input checked="" type="checkbox"/>

[Deselect all 'No'](#)

With selected users...

Send message to 3 people ×

Hey! I noticed you haven't completed this activity. Please do so by Thursday.

Tracking Individual Progress


Jo Tabacek [Message](#)


Complete report


General


[Forum: Announcements](#)
No posts

Moodle Basics & Training Overview (22:39)

 **Video Time:** [Moodle Navigation Guide \(13:38\)](#)
38 views - most recently Wednesday, 6 November 2024, 3:44 PM

 **Video Time:** [Moodle Training Overview & Objectives \(9:01\)](#)
25 views - most recently Wednesday, 6 November 2024, 3:26 PM

 **URL:** [TY 24 Moodle Core Training Suggested Syllabus](#)
4 views - most recently Monday, 4 November 2024, 10:34 AM

 **URL:** [2023 - 2024 Core Case Study Tax Topics Matrix](#)
5 views - most recently Monday, 4 November 2024, 10:34 AM

1. Navigate to “**participants**”
2. Search for desired volunteer & click on blue link of name
3. Navigate to “**reports**” and select “**complete report**”



Reports

[Today's logs](#)

[All logs](#)

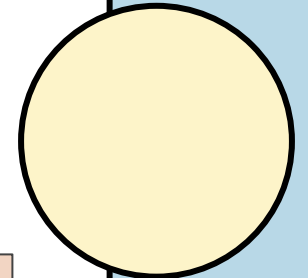
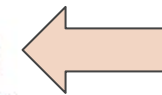
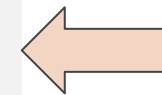
[Outline report](#)

[Complete report](#)

[Browser sessions](#)

[Grades overview](#)

[Grades](#)



The sad news is...

- ★ **Groups do not carry over** between modules
 - You will need to **create your group in EACH module** to track volunteers progress
- ★ Remember to **update volunteers in each module** as they join
 - Or **choose the modules** you care the most about (ie What's New)

Homework!

- ★ If you do not already have one: Set up a Moodle account
- ★ **Play around** with the new training modules
- ★ **Create groups** for your district
 - Get familiar with the steps for using groups
- ★ Create a plan to inform volunteers that **Moodle opens November 13th**



5

Training Support Resources

How to Access Moodle PDF

Moodle Navigation Video

Training Support Resources

Training Support Hotline

844-925-4770
Open 9 AM - 9 PM
Opens Nov. 13

Virtual Chatroom

Included in all
modules

CASH Training Email

training@
cashoregon.org

Live Virtual Training

- ★ Available to anyone statewide
 - Register on **Eventbrite** - Opens Nov. 13th
- ★ Two options for live virtual
 - **Sat. Mornings:** 9:30 AM to 12:30 PM
 - Dec. 7th, 14th & 21st
 - **Tues. / Thurs. Evenings:** 6:00 PM to 9:00 PM
 - Dec. 17th, 19th, Jan 7th & 9th
- ★ Occur on **Zoom**
 - **Recorded** - Sent out and posted in Moodle
- ★ **What's New Classes:** Sat. 9:30 AM to 12:30 PM
 - Sat. Jan 11th & Sat. Jan 18th



Live Training Calendar

6

Q & A

Questions?

Thank you!

Additional questions later?

training@cashoregon.org

jo.tabacek@mfs-cashoregon.org

