



**Student Name:** «Student\_first\_name» «Student\_last\_name»  
**Student Address:** «Addr\_Line1» «Addr\_Line2», «City», «STATE»,  
«postal\_code»  
**Student Phone Number:** «phone»  
**Student Email Address:** «email»  
**Student ID:** «student\_id»

**Course Name:** «title»  
**School Address:** «School\_Address\_Line\_1» «School\_Address\_Line\_2»,  
«School\_Address\_City», «School\_Address\_State»,  
«School\_Address\_Postal\_Code»  
**Start Date:** «class\_start\_dt» **End Date:** «class\_end\_dt»  
**Days and Times of Class (in Central Time):**  
«class\_days» «class\_time»  
**Length of Program:** «program\_length»  
**Method of Payment:** «payment\_method»  
**Amount:** \$ «price»

**Student Signature:** «Student first name» «Student last name»  
**Date:** «registration\_dt»

**Ryan Weber Signature:** 

**Date:** 8/8/24





## **Class Expectations**

This unique blended-learning experience combines live instruction from experienced Tax Professionals with the convenience of Online learning. A component of your training will be completed at your own pace from your personal computer. Upon successful completion of this course, you will learn how to complete a basic tax return, conduct an effective tax interview, and obtain a general overview of local and state tax concepts. The breakdown of training hours is as follows:

40 hours of training  
24 hours of instructor-led  
13 hours of self-study

The attendance requirements state that participants cannot miss or fail to complete more than six (6) hours of any of the instructor-led or practice sessions. All 40 hours of the online learning must be completed to successfully complete the course.

\*\*These hours will vary for H&R Block Income Tax Course offerings held in Oregon, Maryland and California based on the state requirements.

On your first day of class, you will meet your instructor and classmates. You will also receive an overview of the course. You can expect the H&R Block Income Tax Course to meet two-to-three times a week for three-hour sessions. Some courses are offered on weekends to provide additional flexibility. The duration of the course ranges from 6-12 weeks.

## **Course Materials**

No tuition is charged for the H&R Block Income Tax Course, but you are required to purchase the electronic textbook and study guide ("Course Materials"), except in the states of New York, Tennessee, South Carolina and Maine. The total cost for the Course Materials is \$149.00 (except \$99 in Minnesota). Access to these materials will end within three months of the completion of your course.

**REMINDER:** Once classes start, the cost of the Course Materials may be non-refundable. Please see the Refund Policies for more information.

You must be at least 18 years of age at the time of enrollment to enroll in the H&R Block Income Tax Course.





## System Requirements

This training is largely computer-based. You will need access to a personal computer and the internet for the self-paced portion of your training. For students attending a class in the virtual classroom, a computer and internet will be required to attend the instructor-led classes. Therefore, basic computer and typing skills are necessary to be successful. To view the H&R Block System Requirements and Downloads, log into your Block Academy account using the email address you used to register for the course. If you have questions or difficulty logging in to your account, please contact 1-800-HRBLOCK. (800-472-5625).

## Course Completion

Successful completion of the course does not constitute an offer or guarantee of employment with H&R Block. Interested individuals must submit an employment application and meet all applicable hiring requirements including successful completion of the H&R Block Income Tax Course with a passing score. Candidates will interview, and those who are hired will be required to complete additional paid and unpaid training.

The H&R Block Income Tax Course is measured on a pass/fail grading structure. To successfully pass the course a student must meet the minimum attendance requirements and receive a 70% or higher on all quizzes and exams. The course includes workbook assignments, online learning modules, quizzes and exams. The student's quizzes and exam score and attendance record determine if the student passes the course.

## H&R Block Income Tax Course (ITC) Learner Acknowledgements

**By enrolling in the H&R Block Income Tax Course, you accept the terms of the 1) Competitor Exclusion, 2) Attendance, and 3) Computer Usage acknowledgments listed below. If you have questions, please contact 1-800-HRBLOCK. (800-472-5625).**

- 1. Competitor Exclusion Acknowledgment:** The H&R Block Income Tax Course is not intended for or open to any persons currently employed by or seeking employment with any professional tax preparation company or organization other than H&R Block. During the course, should H&R Block learn of any student's employment or intended employment with a competing professional tax preparation company or service, H&R Block reserves the right to immediately cancel the student's enrollment. In the event of such cancellation the student will be required to return all Course Materials.
- 2. ITC Attendance Policy:** Experience tells us that individuals who miss more than two sessions of virtual or in-class training time will not perform at H&R Block's standards. The *Income Tax Course* Attendance





Policy is intended to ensure H&R Block has the best-trained Tax Professionals in the country. A learner cannot miss more than 30 minutes of a virtual or in-person session and receive credit for the session. Arriving late or leaving early may cause a learner to lose attendance credit for that session. The course consists of 24 hours of in-class instruction. Students are encouraged to attend all 24 hours of in-class instruction. Students who miss no more than 12 hours of in-class instruction will meet the minimum attendance requirements. (In-class can be in-person or virtual for those students participating in the virtual tax course.) Students who miss in-class instruction may attend make-up sessions with prior Instructor approval; however, the make-up sessions will not count toward the student's total attendance hours. It is the student's responsibility to complete all exercises and activities covered during any absences from class. Students arriving more than 30 minutes after the scheduled start time of a class may not be given credit for attending the session unless they have made prior arrangements with the Instructor. Because the class time is limited, H&R Block does not authorize Leaves of Absence for students. All of the self-study learning must be completed to successfully complete the course.

3. **California Attendance Policy:** To successfully complete the California ITC, the student must attend 43 or more hours of instructor-led and practice sessions. ITC is eligible for qualifying education only. Successful students may receive up to 60 qualifying education hours. Students cannot miss or fail to complete more than eight hours of any of the instructor-led or practice sessions. All 40 hours of the Online training (33 federal and 7 California) must be completed in addition to the three-hour, California-only, instructor-led session on CA Form 540NR and Schedule CA 540, CA Military, and Ethics, in order to successfully complete the course.
4. **Computer Usage Agreement:** Information stored on H&R Block's computers and network equipment is private property, and access is monitored. The computer systems and applications used in the course are proprietary, and you may use them only for completion of the course for which you registered. Software installed on the computer may not be reproduced or distributed in any way. H&R Block will suspend or revoke the computing privileges of anyone who fails to comply with the terms of this Computer Usage Agreement. In exchange for the use of H&R Block's computers and network equipment during the H&R Block Income Tax Course, you agree to the following:
  - You will not access the internet for any purpose other than as directed by the H&R Block Income Tax Course instructor.
  - You will not attempt to gain unauthorized access to other sites or systems outside of those required to be used for class purposes.
  - You will not download or upload any software.
  - You will comply with all local, state and federal laws.





- You will not intentionally create or distribute any viruses, worms or other forms of electronic malware.
- You will not intentionally damage or otherwise alter the hardware, software, network equipment, or security.

5. **Notice of Right to Cancel:** A student registering for the H&R Block Income Tax Course will have the right to cancel enrollment until midnight of the third business day after receipt of notice of acceptance (unless otherwise permitted by state law). The student will receive a full refund within 10 business days of cancellation if they cancel within the three-business day period.

6. **Grievance Policy:** Any student complaint should first be submitted to the instructor in charge of the class. If the Instructor does not resolve the complaint, the student should contact the H&R Block District Manager or Franchisee. If the District Manager or Franchisee does not resolve the complaint, the student should contact Ryan Weber, VP Workforce Plan & Experience, HRB Tax Group, One H&R Block Way, Kansas City, MO 64105. Complaints must be in written form, signed by both the student and the school official, and marked with the date each step of the process is completed.

7. **State Specific Acknowledgements and Grievance Policies:**

**Arizona** - If the student complaint cannot be resolved after exhausting the Institution's grievance procedure, the student may file a complaint with the Arizona State Board for Private Postsecondary Education by contacting: Arizona State Board for Private Postsecondary Education, 1740 W. Adams Street, #3008 | Phoenix, AZ 85007 | Phone: (602) 542-5709 | Website: [ppse.az.gov/](http://ppse.az.gov/)

Holder in Due Course Statement: Any holder of this consumer credit contract is subject to all claims and defenses which the debtor could assert against the seller of goods or services obtained pursuant hereto or with the proceeds hereof. Recovery hereunder by the debtor shall not exceed amounts paid by the debtor (FTC Rule effective 5-14-76).

**Arkansas** - AR Dept. of Higher Education, 101 E. Capitol Ave., Ste. 300 | Little Rock, AR 72201 | Phone: (501) 371-2000 Website: [www.adhe.edu/private-career-education](http://www.adhe.edu/private-career-education)

The H&R Block Income Tax Course is licensed by the Arkansas Department of Higher Education.

**California** - H&R Block has been approved by the California Tax Education Council to offer this course (CTEC #1040-QE-0886), which fulfills the 60-hour "qualifying education" imposed by the State of California to become a tax preparer. A listing of additional requirements to register as a tax preparer may be obtained by





contacting CTEC at P.O. Box 2890 | Sacramento, CA 65812-2890 | Toll-free Phone: (877) 850-2832 | Website: [www.ctec.org](http://www.ctec.org)

**Michigan** - If a student complaint cannot be resolved after exhausting the Institution's grievance procedure, the student may file a complaint with the Michigan Department of Licensing and Regulatory Affairs by contacting: MI Department of Licensing and Regulatory Affairs, P.O. Box 30018 | Lansing, MI 48909 | Phone: (517) 241- 9221 | Website: [www.michigan.gov/pss](http://www.michigan.gov/pss)

**Missouri** - If a student is not satisfied with H&R Block's resolution of the student complaint submitted, he or she may contact the Missouri Department of Higher Education to indicate his or her desire to file a complaint at: MO Department of Higher Education, 301 W High St. Suite 860 | Jefferson City, MO 65101 | Phone: (573) 751-2361 | Fax: (573) 751-6635 | Website: [dhe.mo.gov](http://dhe.mo.gov)  
Approved and regulated by the Missouri Department of Higher Education, Jefferson City, MO

**Nevada** - If a student complaint cannot be resolved after exhausting the Institution's grievance procedure, the student may file a complaint by contacting the NV Commission on Postsecondary Education, 8778 S. Maryland Pkwy, Ste. 115 | Las Vegas, NV 89123 | Phone: (702) 486-7330 Website: [cpe.state.nv.us](http://cpe.state.nv.us)  
ACCOUNT FOR STUDENT INDEMNIFICATION: In an event of school discontinued operation or a violation by the institution per NRS 394.383 to NAC 394.560, an account for student indemnification may be used to indemnify a student or enrollee who has suffered damage as a result of: discontinuance of operation or violation by such institution of any provision of NRS 394.383 to 394.560.  
Licensed to operate by the NV Commission on Postsecondary Education, Las Vegas, NV.

**Oklahoma** - If a student is not satisfied with H&R Block's resolution of the student complaint submitted, he or she may contact the Oklahoma Board of Private Vocational Schools, 3700 N. Classen Blvd., Ste. 250 | Oklahoma City, OK 73118 | Phone: (405) 528-3370 | Website: [www.obpvs.ok.gov](http://www.obpvs.ok.gov)  
Holder in Due Course Statement: Any holder of this consumer credit contract is subject to all claims and defenses which the debtor could assert against the seller of goods or services obtained pursuant hereto or with the proceeds hereof. Recovery hereunder by the debtor shall not exceed amounts paid by the debtor (FTC Rule effective 5-14-76).  
Approved and regulated by the Oklahoma Board of Private Vocation Schools, Oklahoma City, OK

**Oregon** - In 1973 the Oregon legislature created the Board of Tax Service Examiners, now the Board of Tax Practitioners, to examine and license all persons in Oregon who prepare, counsel, or assist in the preparation of personal income tax returns for a fee. This legislative action was taken to insure competent and ethical tax service to Oregon citizens.





A Tax Preparer License enables a person to lawfully prepare personal income tax returns in Oregon. A tax preparer must work under the supervision of a tax consultant, a certified public accountant, a public accountant, or an attorney. To become a Licensed Tax Preparer in Oregon you must:

Be at least 18 years of age.

Be a high school graduate or have passed an equivalence examination.

Attend and successfully pass an 80-hour course in basic personal income tax law, theory, and practice. This course must be approved by the Board of Tax Practitioners.

#### School's internal grievance policy

If a student has an internal grievance, the student shall follow these steps with the intent to reconcile their concerns in partnership with the school:

Students aggrieved by action of the school should attempt to resolve any problem with appropriate school instructor(s). Should this step fail, the student shall proceed to step number 2.

The student shall submit a written internal grievance to the following email addresses:

[sjayaratne@hrblock.com](mailto:sjayaratne@hrblock.com) and [jbarnett@hrblock.com](mailto:jbarnett@hrblock.com). The email shall be labeled, "Student Grievance."

Once the school receives the time stamped student grievance from the student, the school will have 15 days to do an investigation and provide the student their time stamped written determination.

The school's determination is final.

Should this procedure fail and the student has exhausted the school's internal grievance policy, the student may contact:

The Oregon Higher Education Coordinating Commission

Private Career Schools

Higher Education Coordinating Commission

3225 25th Street SE, Salem, Oregon 97302

Phone: 503-947-5716

Students aggrieved by action of the school should attempt to resolve these problems with appropriate school officials. Should this procedure fail students may contact: Higher Education Coordinating Commission, Private Career Schools, Oregon Higher Education Coordinating Commission, 3225 25th St., SE, Salem, OR 97302. After consultation with the appropriate Commission staff and if the complaint alleges a violation of Oregon Revised Statutes 345.010 to 345.470 or standards of Oregon Administrative Rules 715-045-0001 through 715-045-0210, the Commission will begin the complaint investigation process as defined in OAR 715-045-0023 Appeals and Complaints.

Transcript Disclaimer for Students in Oregon: Transcripts will be maintained by the H&R Block Income Tax School for a minimum of 25 years after student graduates from the program.



**Texas** - If a student is not satisfied with H&R Block's resolution of the student complaint submitted, he or she may contact the Texas Workforce Commission at TX Workforce Commission, Career Schools and Colleges, 101 E. 15th St., Rm. 226T | Austin, TX 78778-0001 | Phone: (512) 936- 3100 | Website: <http://csc.twc.state.tx.us>  
Holder in Due Course Statement: Any holder of this consumer credit contract is subject to all claims and defenses which the debtor could assert against the seller of goods or services obtained pursuant hereto or with the proceeds hereof. Recovery hereunder by the debtor shall not exceed amounts paid by the debtor (FTC Rule effective 5-14-76).

Approved and regulated by the Texas Workforce Commission, Career Schools and Colleges, Austin, TX.

**Wisconsin** - If a student is not satisfied with H&R Block's resolution of the student complaint submitted, he or she may contact the WI Dept. of Safety & Professional Safety -Educational Approval Program, 1400 E. Washington Ave., | Madison, WI 53703 | E-mail: [DSPSEAP@wisconsin.gov](mailto:DSPSEAP@wisconsin.gov) | Website: [www.dsps.wi.gov](http://www.dsps.wi.gov)  
You must be at least 18 years of age to enroll. Date of birth is requested by the State of Wisconsin, but not required by law.

8. **Acknowledgment:** I acknowledge that I have received these Acknowledgements and Refund Policies. I understand that placement in a job with H&R Block is not guaranteed or promised to students. A seat in a classroom location is subject to availability. Course locations are subject to change.

I am at least 18 years of age.

I have read and understood the provisions and legal restrictions described above governing the use of H&R Block's computers and network equipment referenced in this agreement.

I understand the use of H&R Block's computers and network equipment is a privilege, not a right. I also understand if the terms of this agreement are violated, H&R Block may deny me access to its computers and network equipment, remove me from class, and/or may refer my violation to authorities for prosecution, or the imposition of other penalties, depending on the nature of the violation.

