



## Volunteers:

Tax season is just around the corner and the excitement is mounting! **Thank you for your willingness and commitment to become a VITA volunteer with Montgomery County's Community Action Agency.** Your participation can make a big difference in our community.

You may know access to the EITC is nationally considered the most effective program to reduce poverty. But did you know that Community Action's free VITA's tax help has protected families from emergencies, while supporting our local tax base and county businesses as families pay for basics like rent, utilities, and groceries? Or that we've linked families with financial education and savings opportunities and provided referrals to address critical needs, while saving them from paying hundreds of dollars in tax preparation and other unnecessary fees?

Although we provide our free services year-round at our newly relocated main office at the Mid County Regional Services Center in Wheaton, as the recession continues, more people are turning to us for help, and we expect demand to grow. **So, we're hoping we can count on you to volunteer with us during the next tax season, from mid-January through mid-April and/or June through November (current year, prior year, and amended returns).**

There are many kinds of volunteer opportunities –***appointment schedulers, greeters, intake screeners, preparers, promoters, quality reviewers, site coordinators, resource navigators, and interpreters.*** Wondering which one might be right for you? Just review the volunteer descriptions on the back of the **Community Action Agency Prospective Volunteer Form, and complete it to reflect your interests.** We'll keep your information and touch base with you next month with training, certification, and other updates.

On behalf of our partners from the IRS, the City of Gaithersburg, the City of Rockville, Family Services, Inc., the Montgomery County Department of Health and Human Services, Maryland CASH Campaign, local nonprofits and other community groups, thank you for considering VITA as a rewarding opportunity to help your neighbors. If you have questions, please feel free to give me a call, at 240-777-1123.

Sincerely,

Taunya Johnson  
VITA Coordinator



## **COMMUNITY ACTION AGENCY PROSPECTIVE VOLUNTEER FORM**

Appointment schedulers make appointments and explain what documents need to be brought in to have their taxes prepared. They also call clients from list of appointments and remind them of their appointment date and time.

Greeters make sure the clients have all of the necessary paperwork before meeting with a tax volunteers and manage the flow of clients being served. You must have a pleasant personality and a Basic certification from the IRS.

Intake Screeners interact with clients by making sure that they have all of the necessary paperwork, prepare a file folder, and get the client ready to meet with a preparer. You must have a Basic certification from the IRS.

Preparers are responsible for preparing current, prior year, and amended federal and state income tax returns. You must have a Basic, Intermediate, or Advanced Certification from the IRS.

Promoters will go out into the community and disseminate VITA, Earned Income Tax Credit, and Child Tax Credit information.

Quality Reviewers are responsible for the review of all tax returns for accuracy and completeness; you must have a Basic, Intermediate, and Advanced Certification from the IRS.

Site Coordinators are responsible for coordinating the tax site making sure that the site runs smoothly and efficiently, problem solving, e-filing, follow up on rejects and re-file, and be available to clients and preparers to answer any tax questions or concerns. You must have a Basic, Intermediate, and Advanced certification from the IRS.

Interpreters are responsible for interpreting for the volunteer and the tax client in order to complete income tax returns.

Resource Navigators are responsible for screening, completing SAIL applications, online submissions to HHS Income Support, and preparing applications via telephone or in person for interviews with the Income Support Office.



**COMMUNITY ACTION AGENCY'S PROSPECTIVE VOLUNTEER FORM**

**First Name:** \_\_\_\_\_

**Last Name:** \_\_\_\_\_

**Street Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip Code:** \_\_\_\_\_

**Telephone:** (Home) \_\_\_\_\_ (Cell/Work) \_\_\_\_\_

**Email address:** \_\_\_\_\_

**Preferred Site:**    **Gaithersburg**    **Rockville**    **Takoma Park**    **Wheaton**

**Preferred Position: (Check all areas of interest)**

Appointment Scheduler                      Greeter                      Intake Screener

Preparer    Promoter                      Quality Reviewer

Site Coordinator                                      Resource Navigators

Interpreter                      List Languages: \_\_\_\_\_

**Do you prefer training? (Check one)**

**Online?** [www.irs.gov](http://www.irs.gov) and search "link and learn" with online certification

**In-person training** by IRS certified instructors, with online certification

**PLEASE MAIL, EMAIL OR FAX THIS FORM**

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