



Volunteers:

Tax season is just around the corner and the excitement is mounting! **Thank you for your willingness and commitment to become a volunteer with Montgomery County Community Action Agency's Volunteer Income Tax Assistance (VITA) Program.** 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 tax service 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 free VITA tax service year-round at the Rockville and Takoma Park/Silver Spring locations, we expect demand to grow. 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 October** (current year, prior year, and amended returns).

There are many volunteer opportunities available – 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 position descriptions below and complete the Prospective Volunteer Form** to reflect your interests. We will keep your information and touch base with you about training, certification, and other updates.

On behalf of our partners from the IRS, the City of Gaithersburg, 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 call our office at 240-777-1123.

Sincerely,

Volunteer Income Tax Assistance (VITA) Program
Community Action Agency, Montgomery County, MD



COMMUNITY ACTION AGENCY'S VOLUNTEER POSITION DESCRIPTIONS

Appointment Schedulers make appointments and explain what documents clients must bring in to have their taxes prepared. They also call clients to remind them of appointment date and time. Must have the Standard of Conduct certification from the IRS.

Greeters ensure clients have all the necessary paperwork before meeting with tax volunteers and manage the flow of clients being served. Must have an outgoing personality and the Standard of Conduct certification from the IRS.

Intake Screeners interact with clients to determine eligibility and create a file folder which will prepare the client for meeting with a preparer. Must have the Standard of Conduct and Basic certification from the IRS.

Preparers are responsible for preparing current, prior year, and amended federal and state income tax returns. Must have the Standard of Conduct and Basic 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. Must have the Standard of Conduct certification from the IRS.

Quality Reviewers are responsible for the review of all tax returns for accuracy and completeness. Must have the Standard of Conduct and Advanced certification from the IRS.

Site Coordinators manage the tax site to ensure the site runs smoothly and efficiently. They will assist clients and preparers with problem solving, e-filing, follow up on rejects and re-file, and answer any tax questions or concerns. Must have the Standard of Conduct and Advanced certification from the IRS.

Resource Navigators will explain the SNAP program, screen clients, complete SNAP applications, make online submissions to HHS Income Support, and refer clients to other sources of food assistance throughout the County. Must have the Standard of Conduct certification from the IRS.

Interpreters are responsible for interpreting communication between clients and volunteers to complete income tax returns. Must have the Standard of Conduct certification from the IRS.



COMMUNITY ACTION AGENCY'S PROSPECTIVE VOLUNTEER FORM

First Name: _____

Last Name: _____

Street Address: _____

City, State and Zip Code: _____

Telephone: (Home) _____ (Cell/Work) _____

Email Address: _____

Preferred Site:

- | | | | |
|--|-------------------------------------|--------------------------------------|----------------------------------|
| <input type="checkbox"/> Gaithersburg | <input type="checkbox"/> Rockville | <input type="checkbox"/> Takoma Park | <input type="checkbox"/> Wheaton |
| <input type="checkbox"/> East County (Silver Spring) | <input type="checkbox"/> Germantown | | |

Preferred Position: (Check all areas of interest.)

- | | | |
|--|---|---|
| <input type="checkbox"/> Appointment Scheduler | <input type="checkbox"/> Greeter | <input type="checkbox"/> Intake Screener |
| <input type="checkbox"/> Preparer | <input type="checkbox"/> Promoter | <input type="checkbox"/> Quality Reviewer |
| <input type="checkbox"/> Site Coordinator | <input type="checkbox"/> Resource Navigator | |
| <input type="checkbox"/> Interpreter (List Languages): _____ | | |

Training Preference: (Check one.)

- | |
|--|
| <input type="checkbox"/> Online (visit https://www.irs.gov/individuals/link-learn-taxes) |
| <input type="checkbox"/> In-person (meet with IRS certified instructors, online certification) |

PLEASE MAIL, EMAIL, OR FAX THIS FORM TO CAA.

**Mail: Community Action Agency
1401 Rockville Pike, Suite 320
Rockville, MD 20852
Email: VITA@montgomerycountymd.gov
Fax: 240-777-3295
Phone: 240-777-1123**