



1509 Hancock Street
Quincy, MA 02169
(617) 479-8181

www.qcap.org

VOLUNTEER TAX COUNSELOR POSITION DESCRIPTION

CONTACT INFORMATION

Name: Isaias Sarmiento
Title: Financial Literacy/IDA Coordinator
Address: 1509 Hancock Street, Quincy MA 02169
Phone: 617-479-8181 x 374
Fax: 617-479-7228
Email: isarmiento@qcap.org
Website: www.qcap.org

LOCATION

QCAP's Learning Links Technology Center, 1511 Hancock Street, Quincy, MA 02169.
Accessible by MBTA Red Line, Quincy Center stop.

POSITION DESCRIPTION

QCAP seeks volunteer tax counselors to help low income households prepare their federal and state income tax returns, using an on-line tax preparation software. A goal is to help low income people claim tax credits for which they may be eligible. Volunteer counselors provide the assistance in accordance with IRS guidelines, and applicable QCAP policies.

VOLUNTEER TAX COUNSELOR RESPONSIBILITIES

- Become IRS Certified in tax law by completing the on-line Link and Learn Taxes course. Course may be accessed from IRS website www.irs.gov (type Link and Learn Taxes in search box). Intermediate module and certification test must be completed for Volunteers who wish to work with seniors. Total time to complete training for the first time is about 20 hours. Test takes about 1 hour to complete.
- Print Basic and Intermediate (if applicable) test certificates with score and give to QCAP VITA Coordinator.
- Complete on-line Volunteer Agreement Form, and print copy for QCAP VITA Coordinator. Submit completed form electronically to the IRS.
- Participate in a volunteer orientation at QCAP that includes training on using the tax preparation software (estimated 4 hours).
- Provide high quality tax assistance to all customers. Directly prepare customer's returns based on information provided by customer or answer tax related questions.
- Interview customer to determine if all income, deductions and allowable credits are claimed.
- Prepare only those tax returns for which training and certification were provided.

- Refer customers with complex returns to the IRS web site or help number, or to a tax practitioner or firm.
- Complete quality reviews of fellow volunteer tax returns.
- Maintain confidentiality of customer information.
- Ensure a copy of completed return (s) is provided to customer.
- Adhere to Title VI by not denying service to anyone based on race, color, sex, age, national origin, or disability.

Volunteers cannot accept pay or compensation for assistance provided. Volunteers cannot refer customers to any one particular tax practitioner or firm. QCAP maintains a list of area tax practitioners for customer referral purposes.

QUALIFICATIONS

1. Ability to learn and apply basic tax knowledge. Training will be provided.
2. Basic computer skills for inputting tax return information.
3. Pride in performing tasks completely and accurately.
4. Strong interpersonal skills and desire to help people.
5. Ability to maintain taxpayer confidentiality.
6. Ability to work well with diverse populations.
7. Dependability and flexibility.

TIME COMMITMENT

Prior to the start of tax season, volunteers successfully complete the IRS's web-based tax law training and certification program Link and Learn (about 20 hours for new volunteers), and participate in a 4 hour orientation that includes software training.

During the tax season (January 30 through April 15) tax counseling will take place on Thursday evenings and Saturdays. Volunteers should commit 2-4 hours weekly for the duration of the tax season. However, the minimum commitment is 8 hours monthly.

SUPERVISION AND VOLUNTEER LIABILITY

Volunteers will be supervised while on site by an experienced VITA Coordinator. The Coordinator will be available to provide support, guidance, and answer questions. In addition, the Site Coordinator will make sure a quality check of all tax returns is completed, and prepare tax returns for electronic filing.

Volunteers are covered under the Volunteer Protection Action of 1997, which can be found in its entirety at www.irs.gov/individuals. "As long as the volunteer acts within the scope of the Volunteer Return Preparation Program, and has been certified by the IRS as a Volunteer Tax Counselor, they shall not be held liable for any harm caused by an act or omission on their part."

BENEFITS TO VOLUNTEER

1. Rewarding volunteer experience, with the chance to help low income people claim eligible credits and maximize their income.
2. Opportunity to build skills - tax law and electronic tax preparation.
3. Chance to meet other volunteers and build camaraderie among the counseling team.