



1509 Hancock Street
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www.qcap.org

VOLUNTEER TAX SCHEDULER POSITION DESCRIPTION

CONTACT INFORMATION

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LOCATION

Quincy Community Action Programs (QCAP), 1509 Hancock Street, Quincy, MA 02169. Accessible by MBTA Red Line, Quincy Center stop.

POSITION DESCRIPTION

QCAP seeks volunteer tax schedulers to assist in setting up appointments for clients to have their taxes prepared. Volunteer schedulers provide assistance in accordance with IRS guidelines and applicable QCAP policies.

VOLUNTEER TAX SCHEDULER RESPONSIBILITIES

- Call clients to set up tax appointments.
- Record tax appointments on online scheduling calendar.
- Mail/E-mail confirmation forms to clients who receive tax appointments.
- Mail fliers and tax screening forms to clients who wish to receive appointments.
- Refer customers with complex tax questions to IRS website or help number, or to a tax practitioner or firm.
- Maintain confidentiality of customer information.
- 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. Strong customer service and interpersonal skills, and desire to help people
2. Strong computer skills, particularly typing and Internet use
3. Pride in performing tasks completely and accurately
4. Ability to maintain taxpayer confidentiality
5. Ability to work well with diverse populations
6. Dependability and flexibility
7. Knowledge of basic tax law is useful, but not required

TIME COMMITMENT

This position can start as early as January 18, 2012 and will continue through April 14, 2012. Tax scheduling will typically take place during normal business hours from 9AM to 5PM. Hours are flexible, though ideally volunteers will commit 2-10 hours weekly for the duration of the tax season.

SUPERVISION AND VOLUNTEER LIABILITY

Volunteers will be supervised while on site by an experienced Volunteer Site Coordinator. The Site Coordinator will be available to provide support, guidance, and answer questions.

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.
3. Chance to meet other volunteers and build camaraderie among the counseling team.