



VITA Program

PROGRAM OVERVIEW

The Volunteer Income Tax Assistance (VITA) program is a free tax preparation service available to individuals whose household income is \$56,000 or less, the elderly, and persons with disabilities and limited English speakers who need assistance in preparing their tax returns.

Office Location: Main South CDC, 875 Main Street, Worcester MA 01610

Site Phone Number: 508-752-6181

Hours of Operation:

- **Wednesday:** 5:45PM - 8:45PM
- **Friday:** 5:45PM - 8:45PM
- **Saturday Morning:** 10:00AM - 1:00PM
- **Saturday Afternoon:** 2:00PM - 5:00PM

MAIN DUTIES & RESPONSIBILITIES:

- The volunteer may assist as tax preparer, front desk, administrative assistant (see job descriptions for more information) or perform other job-related duties as assigned.
- Required to pass the online IRS certifications and adhere to volunteer standards of conduct.
- Help as front desk or administrative assistant when coverage is needed.
- Schedule appointments and call clients when needed.
- Help clients with their paperwork.
- Report to the VITA Coordinator/Assistant Coordinator on each day services are provided for instruction and guidance.
- Answers basic tax-related questions and ensure taxpayers are not outside of our prescribed scope.
- Ensure no compensation of any kind is accepted for the services volunteers provide.
- Maintains confidentiality of taxpayer information. When in doubt, refer to training materials or ask questions.
- Ensure a copy of the completed return is provided to the taxpayer.
- Attend VITA Closing Ceremony (May 1st at 5:30pm).
- Perform other specific tasks depending on the selected role
- Assist coordinator and Main South cdc staff with other tasks as needed

QUALIFICATIONS:

- Attend volunteer training (VITA Coordinator will provide information)
- Utilize "Link & Learn" online training system to take tests and read standards of conduct

- Successfully pass “Volunteer standards of Conduct” test and “Intake/Interview and quality Review test” test
- Successfully pass Basic or Advanced Exam (only if volunteering as Preparer)
- Willingness to share time, skills and interest.
- Basic computer skills for inputting tax return information
- Pride in performing tasks completely and accurately.
- Ability to work with the public in a helpful and supportive manner.
- Friendly, dependable and flexible.

APPLICATION PROCEDURE:

- Contact VITA Coordinator Eduardo Rivas at erivas@mainsouthcdc.org
- Complete interest form:
<https://forms.gle/EEsz9yj4wnsHJP1F6>
- Get study materials from coordinator
- Pass required IRS certifications
- Submit your schedule and certificates

ROLES & CERTIFICATIONS:

Tax Preparers (Basic level):

- Volunteers standards of conduct Exam
- Intake/interview and quality review Exam
- Basic Exam

Tax Preparers (Advanced level)/Quality Reviewers:

- Volunteers standards of conduct Exam
- Intake/interview and quality review Exam
- Advanced Exam

Front Desk/Administrative Assistants:

- Volunteers standards of conduct Exam
- Intake/interview and quality review Exam

Questions?

Contact Main South CDC VITA Coordinator:
Eduardo Rivas erivas@mainsouthcdc.org
vita@qcc.mass.edu
(508)854-2818(voicemail only)
www.qcc.edu/vita