



VITA

Volunteer Application



First Name _____ Last Name _____
 Address _____ City _____ State _____ Zip Code _____
 Home Phone _____ Cell Phone _____ Work Phone _____
 E-mail Address _____

How would you prefer to be contacted? Home Phone Cell Phone Work Phone E-mail Postal Mail

What volunteer position(s) are you interested in? (see page 2 for descriptions)

- Greeter Basic Tax Preparer Advanced Tax Preparer Screener Basic Reviewer Advanced Reviewer

Have you previously volunteered for VITA? Yes No

Do you have previous tax preparation experience? Yes No please describe: _____

Do you have bilingual skills? Yes No If so, what languages: _____

Hours Available to Volunteer (please select all that apply)

- Mondays: 12:30-3:30p.m. 3:30-6:30p.m.
 Tuesdays: 5:00 - 8:00p.m.
 Wednesdays: 12:30-3:30p.m. 3:30-6:30p.m.
 Thursdays: 12:30-3:30p.m. 3:30-6:30p.m.
 Saturdays: 7:30a-12:30p.m.

How many total hours would you like to volunteer for VITA? _____

Note: Volunteers are asked to commit to at least 20 hours of volunteer time at the VITA site for the entire tax season.

How did you hear about VITA volunteering opportunities? Check all that apply.

- Employee of IRS/ DOR. Which Employer _____ School. Which School _____
 Goodwill NCW web site VITA web site Newspaper Other _____

Emergency Contact Information

Name _____ Relationship to Contact _____
 Primary Phone _____ Secondary Phone _____

Background Information

Do any of your relatives work for Goodwill NCW? Yes No Name(s) _____

Have you ever been convicted of a crime? Yes No

If yes, please explain the nature of the crime, date, and state of conviction:

Medical Consent

I authorize the sponsoring VITA agency to provide first aid to me as may be necessary. I also give my permission to be transported to a local hospital for necessary medical treatment.

Volunteer Signature _____ Date _____

By typing/signing your name in the space above, you are consenting to the above items, and confirming the accuracy of the information provided.

VITA Position Descriptions

Greeter:

A strong Greeter is essential to creating a welcoming atmosphere at the site. Welcome taxpayers, provide intake forms, and assist with stocking supplies. Some Greeters assist in categorizing returns.

Interpersonal skills required.

Basic Income Tax Preparer:

Work one-on-one with taxpayers using intake forms and computer software to prepare basic returns.

No tax preparation experience necessary. Basic computer skills are required.

Advanced Income Tax Preparer:

Prepare intermediate/advanced income tax returns and assist less-experienced volunteers. With additional training you can assist in the Quality Review process to ensure every tax return is completed in full and free of errors.

Income tax background or VITA experience required.

Screeners:

Assist taxpayers in organizing materials and ensure taxpayers have all of the materials required to prepare federal and state income tax returns. Make income tax determinations related to filing status, dependency issues, and income tax credit issues.

Income tax background or VITA experience required.

Basic Reviewer :

Discuss and review completed basic income tax returns with taxpayers. Ensure taxpayer is getting all credits available to them and that they are computed correctly. Obtain necessary taxpayer information and signatures required on form 8879.

Income tax background or VITA experience required.

Advanced Reviewer:

Discuss and review completed intermediate/advanced income tax returns with taxpayers. Ensure taxpayer is getting all credits available to them and that they are computed correctly. Obtain necessary taxpayer information and signatures required on form 8879.

Income tax background or VITA experience required.