



Volunteer Out-of-Scope Scheduler

The Out-of-Scope Tax Preparation program serves low-income clients whose tax situations fall outside the limits placed on the Community Tax Centers as an IRS-sponsored VITA program. Out-of-Scope volunteers provide a free alternative for clients who would otherwise need assistance from a paid tax preparation service. The Out-of-Scope program is a valuable complement to the Community Tax Centers and ensures that as many clients as possible are served when they come to Foundation Communities for assistance. The team works with minimal supervision and coordination by Foundation Communities' staff. Volunteers are screened prior to acceptance.

Volunteer Out-of-Scope Scheduler responsibilities:

- Complete required training and IRS Volunteer Tax Preparer certification test annually to Advanced level
- Monitor email and voice messages sent to the Out-of-Scope program and respond as needed
- Screen clients for eligibility and scope requirements
- Assign clients to Tax Preparers using online scheduling tool
- Communicate directly with clients regarding their tax preparation appointment
- Explain and answer basic questions about the tax preparation process to clients
- Report service hours to the Community Tax Centers Volunteer Coordinator on a monthly basis

Volunteer Training:

Volunteers are expected to attend annual Community Tax Centers training as possible. Alternatively, volunteers can complete independent study using IRS training materials. Training/study must cover topics identified as VITA Basic, Advanced, and Military, as well as topics which are identified annually as out-of-scope for VITA but in scope for this program. (See current Out of Scope handout on www.ctcresources.com.) Schedulers are not expected to provide tax expertise on Military and out-of-scope topics but need to be acquainted with them for the purpose of screening clients and advising them on documents to bring to their tax preparation appointment.

Volunteer should be comfortable:

- Using Windows-based software and Google Office (training available)
- Communicating by phone and email with clients
- Providing excellent customer service to people from all walks of life
- Problem-solving with minimal collaboration or supervision

Volunteer Benefits:

- Free training on tax law and tax return preparation
- Ability to serve remotely or at one of two Community Financial Centers operated by Foundation Communities
- Flexibility to set own schedule
- Resources and staff support at each tax center
- Hands-on, real-world experience

Volunteer Commitment:

Scheduler tasks require 10-20 per week from mid-January to mid-April, peaking in mid-February. Ideally, two or three Schedulers will split the time commitment to ensure coverage throughout tax season.

For more information, please contact:

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