

VOLUNTEER APPLICATION PACKET 2008



Thank you for volunteering and welcome aboard!

KC CASH VITA (Volunteer Income Tax Assistance) sites are open at various locations within the community from late January through mid-April. The times vary, but most are open evenings and Saturdays. Volunteers are needed to commit to **four hours a week** during the tax season.

Your Name:

Date:

() New Volunteer () Returning Volunteer For How Many Years? ()

Note: If you are a returning volunteer and your contact information has not changed – proceed to the next page.

HOME ADDRESS:

City, State, and Zip Code:

E-mail Address:

Phone Number (Day):

Fax Number:

Emergency Contact:

Relationship:

Phone Number:

COMPANY NAME:

Title:

Company Address:

City, State, and Zip Code:

Phone Number (Day):

Fax Number:

() **I cannot volunteer** for the upcoming tax season but would be interested in volunteering at some time in the future. **Please keep me on your mailing list.**

() **I know of someone who would like to volunteer.** Their contact information is:
Name: _____

Phone Number (Day): _____ Fax Number: _____


E-mail address: _____

Your Name:

Date:



Please select your volunteer position

Check all that Apply (X)	Volunteer Position	Description of Position	To Select Your VITA Site Location(s) & Your Training Class(es) Go to the page numbers listed below
	Tax Preparer	Tax preparers will review client documentation, interview the client, and prepare Federal and State income tax returns using computer software. Only basic returns will be prepared – no businesses, rentals, estates, trusts, etc. Volunteers are needed at their site once a week for at least four hours. Volunteers must have basic computer skills and have the ability to use Microsoft Windows type programs. Familiarity completing Federal Income Tax Returns is recommended (i.e. completing your own or for someone else)	<p>Go to Page 3 & 4 – Sites Page 5 – Training</p>  <p>You must attend the training class(es) that corresponds with the type of software being used at the VITA site.</p>
	Greeter	Greeters serve as the initial contact to the clients, help coordinate the traffic flow, and ensure that clients seeking service qualify for free assistance. No tax knowledge is necessary.	<p>Go to Page 3 & 4 – Sites Page 6 – Training</p>
	Information Assistant	Information Assistants are the liaisons for the client between the greeter and the tax preparer. Responsibilities include gathering appropriate documentation, reviewing information sheets for completion, and providing appropriate referrals as indicated on the information sheet. No tax knowledge is necessary.	<p>Go to Page 3 & 4 – Sites Page 6 – Training</p>
	Bilingual Spanish/English Interpreters	Spanish/English bilingual interpreters are responsible for facilitating communication between the client and the VITA site volunteer.	<p>Go to Page 3 & 4 – Sites Page 6 – Training</p>
	Trainer	Trainers prepare volunteers for their service. Experience in completing basic Federal Tax Returns and efficiency in using the computer and Microsoft Windows Programs, is highly recommended.	<p>Go to Page 3 & 4 – Sites Page 6 – Training</p>
	Quality Reviewer	The quality reviewer checks the completed tax return to ensure its accuracy and completeness. Quality reviewers must be certified at the advanced level, have two years experience preparing tax returns, and complete TaxWise software training.	<p>Go to Page 3 & 4 – Sites Page 6 - Training</p>
	Site Coordinator	Site Coordinators are ultimately responsible for all facets of a VITA site, including: volunteer management, set-up of site, transmission of returns, contacting clients of rejected returns & correcting and retransmitting their returns, assuring that procedures are being followed, maintaining IRS e-file Signature Authorization forms, and collecting & submitting forms for data collection.	<p>Go to Page 3 & 4 – Sites Page 6 – Training</p>

Your Name:

Date:



Please select your KC CASH VITA Site(s) and Shift(s)

Sites generally open at the end of January and remain open during the tax season through the middle of April. The hours listed at each site can be flexible if needed.

We strive to ensure that you are assigned to the site that you select, when possible. You will be contacted if the chosen site is not available and asked to make another selection. If you are willing to work at more than one site please mark each location.

We try to provide the most up-to-date information regarding site locations for the 2008 tax filing season. However, due to circumstances beyond our control, the days, times, and locations may change. We apologize for any inconvenience this may cause you.

KANSAS LOCATIONS

Site Name	Site Address	Site Coordinator	Type of TaxWise site	Shifts Available	Check your Choice (X)
Catholic Charities/EI Centro (open The ability to speak Spanish at this site is helpful)	2220 Central Ave. Kansas City, KS 66102	Cole Erdmann	TaxWise Desktop Version	Thursdays 4:30 p.m. – 9:00 p.m.	
				Saturdays 8:00 a.m.– 11:30 a.m.	
				Saturdays 11:30 a.m. – 3:30 p.m.	
Catholic Charities/EI Centro (The ability to speak Spanish at this site is helpful)	Olathe, Ks TBD	TBD	TaxWise Desktop Version	TBD	
Kansas City Kansas Community College (open from 1/31/09 – 4/15/09)	7250 State Ave. Kansas City, KS 66112	Joyce Griffin	TaxWise Online Version	Mondays (February only) 4:30 p.m. – 9:00 p.m.	
				Wednesdays 4:30 p.m. – 9:00 p.m.	
				Saturdays 8:30 a.m. – 1:00 p.m.	

See Missouri VITA Site locations listed on the next page....please continue.



Your Name:

Date:

(Continued) – Please select your KC CASH VITA Site(s) and Shift(s)

MISSOURI LOCATIONS

Site Name	Site Address	Site Coordinator(s)	Type of TaxWise Site	Shifts Available	Check Your Choice (X)
Blue River Community College (open from 2/06/2009 – 4/11/2009)	20301 E. 78 Hwy Education Center – Room 118, Independence, Mo 64057	Lynn Canaday	TaxWise Online Version	Fridays – 9:00 a.m. to 1:00 p.m. Saturdays – 9:00 a.m. to 1:00 p.m.	<input type="checkbox"/>
Housing Authority of Kansas City, Missouri (open from 1/31/09 – 2/28/09 only)	299 Paseo Blvd. Kansas City, MO 64106	Shontel McGee and Greg Housel	TaxWise Desktop Version	Mondays 5:30 p.m. – 8:00 p.m. Saturdays 9:00 a.m.– 2:00 p.m.	<input type="checkbox"/>
Metropolitan Missionary Baptist Church – (open from 2/01/09 - 4/15/09)	2310 E. Linwood Blvd – Kansas City, MO 64109	Sirlena R. Johnson	TaxWise Online Version	Wednesdays 6:00 p.m. – 8:30 p.m. Saturdays 11:00 a.m. – 4:30 p.m. Monday – April 14 and Tuesday – April 15 – 6:00 p.m. – 8:30 p.m.	<input type="checkbox"/>
Penn Valley Community College (open from 2/3/09 – 4/14/09)	3201 SW Traffic- way, Campus Center, 2 nd Floor, Kansas City, MO 64111	TBD	TaxWise Online Version	Tuesdays 4:00 p.m. – 8:00 p.m.	<input type="checkbox"/>
The Salvation Army (open from 1/31/09 – 4/11/09 - the ability to speak Spanish is helpful)	3013 E 9 th Street Kansas City, MO 64124	Joyce Schau and Jim Cioccio	TaxWise Online Version	Saturdays 9:00 a.m.– 3:00 p.m. (lunch is provided)	<input type="checkbox"/>
United Way of Greater Kansas City Maple Woods Community College (open from 2/04/09 – 4/08/09)	2601 NE Barry Rd., Learning Resource Building, Multi- Media Lab Kansas City, MO 64156	Cheryl Moran	TaxWise Online Version	Wednesdays 4:30 p.m. – 8:00 p.m. Saturdays 10:00 a.m.– 2:00 p.m. (Closed March 9 and March 14-Spring Break)	<input type="checkbox"/>
UMKC Law School- (open from 01/31/09 – 4/11/09)	5100 Rockhill Rd, UMKC Law Library, Kansas City, MO 64110	Heath Hoobing	TaxWise Online Version	Tuesdays 5:30 p.m. – 8:30 p.m. Saturdays 10:00 a.m. – 4:00 p.m.	<input type="checkbox"/>
United Way of Greater Kansas City – Independence (open 2/3/09 – 4/14/09)	Independence City Hall, 111 E. Maple, Independence, MO 64050	TBD	TaxWise Online Version	Two Weeknights TBD 4:00 – 8:30 p.m.	<input type="checkbox"/>
United Way of Greater Kansas City – Longview Community College (open 1/31/09 – 4/11/09)	Longview Comm. College, 500 SW Longview Rd, Lee’s Summit, MO 64081	TBD	TaxWise Online Version	Saturdays 10:00 – 2:00 p.m.	<input type="checkbox"/>



Your Name:

Date:

Please select your Training Class (this page for tax preparer volunteer positions ONLY)

You must attend all training dates as indicated for the class you select.

Check Your Choice (X)	Course #	Course Title	Dates	Time	Location	Notes
	1	Combined Tax Law/ TaxWise Online Version	January 12, 14, and 16, 2009	8:30 a.m. – 4:30 p.m.	Kansas City Kansas Community College 7250 State Ave - KCKS Flint High Tech Building – Upper level Computer Lab – Room #3624 - Suggested parking in the lot just north of Building – “H” or in the lot just west of the Performing Arts Building “F”	For new or returning volunteers who will be volunteering at a TaxWise Online Version site
	2	Combined Tax Law/ TaxWise Desktop Version	January 5, 12, and 26, 2009	8:30 a.m. – 4:30 p.m.	Housing Authority of Kansas City, MO 299 Paseo KCMO 64106	For new or returning volunteers who will be volunteering at a TaxWise Desktop Version site
	3	Combined Tax law/ TaxWise Desktop Version	January 10, 17, and 24, 2009	8:30 a.m. – 4:30 p.m.	Penn Valley Community College - 3201 SW Trafficway – KCMO – Campus Center – (Park in the Central Parking Garage off Broadway)	For new or returning volunteers who will be volunteering at a TaxWise Desktop Version site
	4	Combined Tax Law/ TaxWise Desktop Version	January 13, 14, 15, 20, and 21, 2009	6:00 p.m. – 9:30 p.m.	Penn Valley Community College -3201 SW Traffic way – KCMO – Campus Center – (Park in the Central Parking Garage off Broadway)	For new or returning volunteers who will be volunteering at a TaxWise Desktop Version site
	5	Tax Law – Self-Study with Student Guide				This class is appropriate for returning volunteers who will be volunteering at a TaxWise Desktop Version site – Volunteers selecting this training option MUST attend Course #7.
	6	Tax Law – Online with IRS Link and Learn				This class is appropriate for returning volunteers who will be volunteering at a TaxWise Online Version site . Volunteers selecting this training option MUST attend Course #7.
	7	Condensed/ Combined Tax Law/ TaxWise Desktop Version	January 31, 2009	8:30 a.m. – 4:30 p.m.	Penn Valley Community College - 3201 SW Trafficway – KCMO-Campus Center – (Park in the Central Parking Garage off Broadway)	For returning volunteers who will be volunteering at a TaxWise Desktop or Online Version site

OPEN LABS FOR EXTRA PRACTICE:

Housing Authority of Kansas City 299 Paseo KCMO 64106	January 9, 16, and 23 8:30 a.m. – 11:30 a.m.	TaxWise Desktop Version
Penn Valley Community College 3201 SW Traffic way – KCMO – Campus Center – (Park in the Central Parking Garage off Broadway)	January 20 and 21 5:30 p.m. – 8:30 p.m.	TaxWise Desktop Version and TaxWise Online Version

Note: All tax preparers must pass the basic and intermediate tests in order to be certified. Be sure to talk with your Instructor and or/your site coordinator about this requirement. Site coordinators and quality reviewers must be certified at the advanced level.

If you would like to receive your study materials before class, please contact Jim Cioccio at: 816-792-4232 or at jcioccio@sbcglobal.net.



Your Name:

Date:

Greeters, Information Assistants, Bilingual Spanish/English Interpreters (ONLY)

Please select your Training Class

Check Your Choice (X)	Date	Time	Location
	Tuesday, January 13, 2009	9:00 a.m. - 11:00 p.m.	The Salvation Army Headquarters – 3637 Broadway Kansas City, MO 64111
	Tuesday, January 13, 2009	6:00 p.m. – 8:00 p.m.	Kansas City Kansas Community College 7250 State Ave - KCKS Flint High Tech Building Upper level – Room #3625 - Suggested parking in the lot just north of Building – “H” or in the lot just west of the Performing Arts Building “F”

Trainers (ONLY)

Check Your Choice (X)	Date	Time	Location
	Thursday December 18, 2008	9:00 a.m. – 4:30 p.m.	Kansas City Kansas Community College 7250 State Ave - KCKS Flint High Tech Building Upper level – Computer Lab – Room #3624 - Suggested parking in the lot just north of Building – “H” or in the lot just west of the Performing Arts Building “F”

Quality Reviewers (ONLY) In Addition to Tax Law/TaxWise Training

Check Your Choice (X)	Date	Time	Location
	Friday- January 9, 2009 Online training website: http://www.eitcplatform.org/Training.asp (user name: kccash, password: kansascity)	2:00 p.m. – 3:00 p.m.	Kansas City Kansas Community College 7250 State Ave - KCKS Flint High Tech Building Upper level – Computer Lab – Room #3624 - Suggested parking in the lot just north of Building – “H” or in the lot just west of the Performing Arts Building “F”

Site Coordinators (ONLY)

Check Your Choice (X)	Date	Time	Location
	Friday January 9, 2009	9:00 a.m. – 3:00 p.m.	Kansas City Kansas Community College 7250 State Ave - KCKS Flint High Tech Building Upper level – Computer Lab – Room #3624 - Suggested parking in the lot just north of Building – “H” or in the lot just west of the Performing Arts Building “F”



Please return completed form(s) by **December 31, 2008** to: Carlotta Roberts,
KC CASH Volunteer Committee Chairperson - Missouri Gas Energy –
3420 Broadway 7th FL - Kansas City, MO 64111-2404 – FAX (816) 968-5250
e-mail : carlotta.roberts@sug.com

Thanks again for volunteering with KC CASH!



Save This Date:

Thursday, May 14, 2009

6:00 p.m.

Location: TBD

You and your guest are invited

to join us for our

KC CASH Coalition, Inc.

Annual Volunteer Appreciation Event

Good Food, Fun, Fellowship

and Door Prizes too!

Hope to see you there!