

First message to taxpayer after ticket has been created

Hi [Taxpayer First Name],

Great job getting started with Community Action Pioneer Valley's VITA Free Tax Assistance program with Get Your Refund! Replying to this message is the fastest way to reach us at Community Action. Please let us know how we can help! We look forward to speaking with you, and please note that due to the nature of tax clinics, our volunteers might call before or after your scheduled appointment time. The volunteers will be calling you from (650)449-4147 during your appointment.

Thank you!

Community Action Pioneer Valley

Message to taxpayer before reviewing their documentation for intake call

Hello [Name], I am going over the documents you've submitted and will call you in about 10 minutes to ask some additional questions. Thanks! [Name] with Community Action Pioneer Valley and Get Your Refund

Message to taxpayer if you called them for intake and they didn't answer

Hello [Name], I just called you for your tax appointment but was unable to reach you. I can hold your appointment for the next 10 minutes, but after that can't guarantee we'll be able to get to you tonight. Please respond to this message and let us know if you're able to make it. If we don't hear from you, we'll give you a call on a clinic night within the next week. Thanks! [Name] with Community Action Pioneer Valley and Get Your Refund

If there is a child born in 2020 or 2021

Hello [Name], I noticed that a new baby joined your family in either 2020 or 2021. Congratulations! The addition of this child in your family makes you eligible for a new Massachusetts savings program called BabySteps. This program sets up each child with a 529 College Investing Plan. The state will also deposit \$50 in on behalf of your child into this account! Here is the link to easily set up this account: <https://www.mass.gov/babysteps> Thanks! [Name] with Community Action Pioneer Valley and Get Your Refund

Message to taxpayer when return is ready for QR

Hello [Name], I have completed preparing your return. A Community Action staff member will now review it to ensure everything is accurate and complete. They will contact you to schedule a final phone call to go over the details of your return, share your refund amount, and collect your signature. In the meantime, the best way to contact us is by responding to this message. Thanks! [Name] with Community Action Pioneer Valley and Get Your Refund

Message to taxpayer after their return has been accepted

Hello [Name],

Your 2021 tax return has been accepted! Please share your thoughts with us by completing our taxpayer satisfaction survey by clicking here:

www.communityaction.us/after-the-return

You can check the status of your federal refund online at the IRS' Where's My Refund Site: <https://sa.www4.irs.gov/irfof/lang/en/irfofgetstatus.jsp>

Thanks, [Name] with Community Action and Get Your Refund