City of Phoenix

VITA Greeter/Screener Job Description and Responsibilities

The City of Phoenix **VITA Greeter / Screener** is responsible for welcoming all taxpayers to the site and maintaining the waiting area. The Greeter/ Screener works closely with the site coordinator to monitor site traffic. The Greeter / Screener also works closely with the tax preparers to ensure taxpayers are assigned to the appropriate tax certified preparer based on the certification level needed to correctly prepare tax return. All Greeters / Screeners are required to attend an annual one day 3 hour training to ensure they have the most up to day VITA Program information.

Greeter / Screener Job Description:

- Adheres to the VITA/TCE Volunteer Standards of Conduct – Ethics Training, Publication 4961 Volunteers Standards of Conduct and the City of Phoenix VITA Program Policy and Procedures Manual.
- Greets taxpayers and ensures taxpayers are served in the order they arrive and ensures sufficient time is allowed for all taxpayers being checked in at the site to receive assistance.
- Ensures taxpayers meet VITA program guidelines and the tax return is within scope of service using the VITA TaxSlayer Map and the assistance of their site coordinator.
- Screens taxpayer information to ensure taxpayers provide all required identifications and tax documents/information to complete a tax return.
- Reviews the Intake/Interview & Quality Review Sheet and asks follow-up questions to clarify any unclear circumstances when necessary.
- Refers taxpayers to the appropriate local offices or organizations if tax returns are out of scope for the VITA Program.
- Records statistical/demographic information when needed by distributing the COP client survey sheet.
- Adheres to the IRS Privacy and Confidentiality, IRS Publication 4299 guidelines.
- If applicable, may be asked to help with translation when needed.
- If the site opens on an appointment basis, contacts the scheduled taxpayers to confirm appointment if necessary.

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