

Volunteer Position Description

No prior tax experience is required and **FREE** training is provided!

Site Coordinator

- Provide coordination, organization and supervision for a Volunteer Income Tax Program site
- Conduct Quality Reviews for the site
- Ensure that all volunteer Tax Preparers are certified
- Coordinate a schedule for volunteers
- Compile reports and volunteer hours on a monthly basis
- **Complete and be certified in the IRS tax law and tax software training**

Tax Preparer

- Provide free basic tax return preparation for eligible taxpayers
- Prepare basic 1040 tax returns and related schedules
- Answer tax-related questions
- Ensure a copy of the completed return is provided to the taxpayer
- **Complete and be certified in the IRS tax law and software training**

Screeener

- Performs screening process of all taxpayers to determine the type of assistance needed
- Ensure the taxpayer has the necessary information and documents to complete a tax return
- Monitors site traffic to ensure that sufficient time is allowed for all taxpayers being checked in to receive assistance
- **Complete and be certified in the IRS tax law and software training**

Greeter

- Greet the customers and sign them in
- Ensure that the customer has brought all the necessary information
- Monitors site traffic to ensure all taxpayers checking in receive assistance
- Assist the Tax Preparers as needed

Instructor

- Instructs tax law classes and software classes
- **Completes and pass the IRS tax law test at 80 percent or above**

Interpreter

- Provide interpreter services to customers and assist the Tax Preparer

All volunteers will maintain confidentiality of customer information.