

Volunteer Roles

Greeter/Screenener - Set a good tone

Do you want to ensure that everyone feels welcome in our tax assistance sites? Greeters/Screeners are the first point of contact for clients entering a tax site. You will ensure that clients have the necessary documents and direct them through the intake process. This role is crucial to ensuring a smooth and efficient flow.

- **Training:** Optional classroom training (online available too)
- **Certification:** Volunteer Standards of Conduct and Intake/Interview and Quality Review exams

CASH Coach-Provide financial resources

CASH stands for Creating Assets, Savings, and Hope. CASH Coaches do that by connecting clients with important financial resources available in their community. These volunteers promote products and services that encourage savings techniques and financial well-being.

- **Training:** Attend a short training (TBD)
- **Certification:** Volunteer Standards of Conduct exam

Interpreter-Translate for non-English speaking customers

Volunteers in this role provide free interpretation services to clients who are not fluent in English. Basic tax knowledge is helpful for interpreting some financial jargon, but not required.

- **Training:** None
- **Certification:** Intake/Interview & Quality Review and Volunteer Standards of Conduct exams

Tax Preparer-Do the clients' taxes

Tax Preparer is the most vital volunteer role at any of our community-based tax sites. You will directly provide free tax preparation services to tax filers using IRS-approved online software. If you are already a tax pro, this is a great way to put your skills to good use in your community. If thinking about 1040's and W2's makes you queasy, what better way to master the subject?

- **Training:** Attend a classroom tax preparation training or use training materials available on our website
- **Certification:** Advanced Tax Law is preferred. Intake/Interview & Quality Review exam and Volunteer Standards of Conduct exam

Quality Reviewer-Double-check returns

All tax returns prepared at Volunteer Income Tax Assistance (VITA) sites, must be reviewed for optimal quality before filing. Quality Reviewers look over completed returns to ensure they are accurate and most advantageous to the taxpayer.

- **Training:** Attend a classroom tax preparation training or use training materials available on our website.
- **Certification:** VITA Advanced certification is required. Intake/Interview & Quality Review exam and Volunteer Standards of Conduct exam

Assisted Self-Tax Preparation Coach-Help the customers do their taxes If you would rather help a client learn how to complete their own tax return, you can volunteer as a Coach. Volunteers guide filers through a free online service and answer questions

- **Training:** Attend a classroom tax preparation training or use training materials available on our website.
- **Certification:** VITA Advanced certification is required. Intake/Interview & Quality Review exam and Volunteer Standards of Conduct exam

Technology Support Specialist/Set-Up & Take Down Aide-Work with equipment not taxes do you enjoy working with computers? Volunteers in this role help with setting up sites before opening and/or packing up at closing time.

- **Training:** None
- **Certification:** Volunteer Standards of Conduct exam