

Volunteer Roles and Responsibilities

Roles and Responsibilities for all Volunteers

- Complete Volunteer Standards of Conduct training and complete and sign Form 13615, *Volunteer Standards of Conduct Agreement*
- Ensure no compensation of any kind is accepted for the volunteer services provided
- Maintain confidentiality and protect taxpayer information
- Take pride in performing tasks completely and accurately
- Interact with taxpayers, volunteers, partners and IRS in a professional and courteous manner
- Be friendly, dependable and flexible
- Adhere to Title VI by not denying service to anyone based on race, color, sex, age, national origin or disability
- Support VITA/TCE programs

Volunteer Tax Preparer

Roles:

Provide free tax return preparation for eligible taxpayers. Establish the greatest degree of public trust, to provide top quality service and uphold the highest of ethical standards.

Responsibilities:

- Complete the Volunteer Standards of Conduct.
- Complete tax law and electronic filing software training.
- Prepare only tax returns within your level of tax law certification.
- Provide high-quality tax return preparation to all taxpayers.
- Using the appropriate Intake and Interview form, interview taxpayer to determine if all income, deductions and allowable credits are claimed.
- Include taxpayer in the preparation of the return.
- Refer customers with returns out of scope returns of the VITA/TCE program to a paid practitioner or firm.
- Verify the returns have the correct Site Identification Number.
- Advise the taxpayer that he/she is ultimately responsible for the information on the return before asking the taxpayer to sign the return.
- Ensure Form 8879 is signed by the taxpayer before transmitting the return.
- Ensure all returns you prepare are quality reviewed.

Volunteer Quality Reviewer

Roles:

Provide quality review of all tax returns completed by Volunteer Tax Preparers at the volunteer tax site. Ensure every customer visiting the site receives top quality service and that the tax returns are error-free.

Responsibilities:

- Certify at the Intermediate level, at minimum. For more complicated returns, certify at the Advanced, Military, or International tax law levels.
- Conduct a quality review using Form 13614-C, Section C, on all returns prepared at the site.
- Before asking the taxpayer to sign Form 8879 or the return, advise the taxpayer that he/she is ultimately responsible for the information on the return.
- Explain to the taxpayer that by signing the return, it guarantees that the taxpayer has examined the return and its accompanying forms and schedules for accuracy.
- Provide feedback to your Volunteer Tax Preparers regarding any errors made on tax returns.

Volunteer Screener/Greeter

Roles:

Provide support to the site and volunteer preparers by screening all taxpayers to ensure the taxpayer has necessary information and documents required to complete a tax return. Screeners can **not** answer any tax law questions or determine certification levels unless they are certified in tax law.

Note: A screener assisting taxpayers with any tax law topics, must be certified at the appropriate levels (Basic, Intermediate, Advanced, Military, etc), before providing assistance. A certified screener can determine the required certification levels needed for return preparation based on the taxpayer's documentation and refer customers with out of scope returns to a tax practitioner.

Responsibilities:

- Develop a log or check sheet to sign in taxpayers needing assistance.
- Greet all taxpayers visiting the site to create a pleasant atmosphere.
- Give each taxpayer Form 13614-C, *Intake/Interview & Quality Review Sheet*.
- Screen taxpayers to determine the type of assistance they will need.
- Ensure the taxpayer has brought the required documents (e.g. valid picture identification, Social Security card(s), W-2, 1099's, last year's return) from which a tax return can be completed.

- Monitor site traffic to ensure that sufficient time is allowed for all taxpayers being checked in at the site to receive assistance.
- Basic tax knowledge (Form 1040, Form 1040A and Form 1040EZ) is a plus but not required.

Roles:

Oversee the operation of all computers and printers at the site or partner level throughout the filing season.

Responsibilities:

- Working knowledge of personal computers, software and communications systems.
- Verify tax software system requirements for all computers.
- Frequently run speed test, if using Tax Wise.
- Verify all defaults and passwords are set correctly for all computers.
Ensure end of filing season equipment clean up process.

Volunteer Interpreter

Roles:

Provide FREE interpreter services to customers at a Volunteer Tax site (e.g., non-English speaking and hearing-impaired). Interpreter should be proficient in a particular interpreter skill (e.g., ability to translate to and from English, sign-language).

Responsibilities:

- Work with the Volunteer Site Coordinator to establish special VITA/TCE sites that focus on the volunteer's interpreter skills (e.g., Spanish speaking and hearing-impaired).
- Work with Volunteer Recruitment/Publicity Specialist to ensure interpreter services are advertised in special site promotions.
- Basic tax knowledge (Form 1040, Form 1040A and Form 1040EZ) is helpful, but it is not required for this position. Basic tax training and certification will be provided if requested.