

Volunteer Screener/Greeter

- 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

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.