



## **Volunteer Greeter**

### ROLE SUMMARY

Welcome clients, help them check in, and confirm they have the documents they need for their appointment.

### ROLE DESCRIPTION

- Create a pleasant atmosphere at the Volunteer Income Tax Assistance (VITA) site, including welcoming clients and signing them in for assistance.
- Explain the site's tax return preparation process to clients.
- Ensure clients have the necessary documents for the preparation of their tax returns, including valid photo identification, Social Security card(s), W-2, 1099, 1095, prior year tax return, etc.
- Provide clients with Form 13614-C, Intake/Interview and Quality Review Sheet, to complete.
- Monitor site traffic to ensure there is enough time for all clients to receive assistance.
- Engage with other volunteers, staff, partners, and clients in a helpful and supportive manner.
- Maintain confidentiality of client information.

### TRAINING REQUIREMENTS

- New volunteer greeters must complete the Volunteer Standards of Conduct (VSC) Training – Ethics
- Returning volunteer greeters are encouraged to review the VSC Training
- All volunteer greeters or screeners must complete the VSC certification