



Volunteer Screener

ROLE SUMMARY

Welcome clients, help them check in, confirm they have the documents they need for their appointment, answer tax law questions, and assign tax returns to tax preparers.

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 completing their tax return, 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, and answer questions and help with completing the form if needed.
- Answer tax law questions within volunteers' certification level(s), determine whether basic or advanced training level is needed to prepare client tax returns, and assign client tax returns to appropriately certified tax preparers.
- 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 screeners must complete
 - The Volunteer Standards of Conduct (VSC) Training – Ethics
 - Publication 5101, VITA/TCE Intake/Interview and Quality Review Training
- Returning volunteer screeners are encouraged to review the VSC Training
- All volunteers who answer tax law questions or assign, prepare, and quality review tax returns must complete
 - The VSC certification
 - Intake/Interview and Quality Review certification
- Certification at the Basic level is the minimum requirement
- For more complicated tax returns, certification at the Circular 230, Advanced, Military, Puerto Rico levels, Foreign Student, or international tax law levels is required