



## **VITA Site Greeter/Screenener**

### **Roles:**

A person who provides support to the Volunteer e-File Tax Preparers who volunteer at a Volunteer Return Preparation site. This person performs screening of all customers that are requesting assistance at the site to identify what type of return and tax schedules each customer will need assistance with and to ensure the customer has the necessary information required to complete his/her return.

### **Tasks:**

- Developing a log or check sheet to sign in customers needing assistance.
- Greeting all customers visiting the site to create a pleasant atmosphere.
- Performing screening process of all customers.
- Surveying customers to determine the type of assistance they will need and the tax forms that will be required to complete their tax return.
- Ensuring the customer has brought the necessary information (e.g. W-2, 1099's, last year's tax return) from which a tax return can be completed.
- Completing the customer information sheet for Volunteer Tax Preparer's reference.
- Signing in customers indicating what type of return needs to be completed.
- Monitoring site traffic to ensure that sufficient time is allowed for all customers being checked in at the site to receive assistance.
- Referring customers with complex returns to the IRS website or toll-free number, or to a tax practitioner or firm. However, volunteers should never refer customers to a specific practitioner or firm.
- Maintaining confidentiality of customer information.
- Providing general assistance to site patrons.
- Assisting Volunteer Tax Preparers as necessary.
- Adhering to Title VI by not denying service to anyone based on race, color, sex, age, National origin or disability.

### **Skills:**

- Basic tax knowledge (Form 1040, Form 1040A, Form 1040EZ). Basic tax training and certification will be provided as needed.
- Willingness to share time, skills, and interests – e.g. volunteer a minimum of 2 to 4 hours per week for the Volunteer Tax Program from approximately Mid-January through Mid-April.
- Ability to deal with the public in a helpful and supportive manner.
- Pride in performing tasks completely and accurately.
- Friendly, dependable, and flexible.