

Tax Site Greeter

Volunteer Job Description

DUTIES:

- Greet taxpayers to create a safe, welcoming atmosphere
- Provide taxpayers with intake and survey forms to complete
- Ensure taxpayers have necessary documentation (e.g., W-2)
- Answer non-tax related questions
- Monitor and facilitate site traffic to enhance efficient services to all taxpayers
- Meet “qualifications” and complete “required training” listed below

QUALIFICATIONS:

- Must be both personable and organized. Great emphasis is placed on quality customer service. Greeters are our “first line” team members
- Commit to volunteering a minimum of 20 hours during tax season
- Complete the IRS Standards of Conduct test
- Be a United States Citizen or in the United States legally

REQUIRED TRAINING:

Volunteer Orientation (for NEW volunteers only)

Online session for NEW volunteers only. Date and time to be distributed via email.

TAX PREPARER TRAINING OPTIONS:

- Self-taught online.
- Limited classroom sessions offered online. Dates and times to be distributed via email.