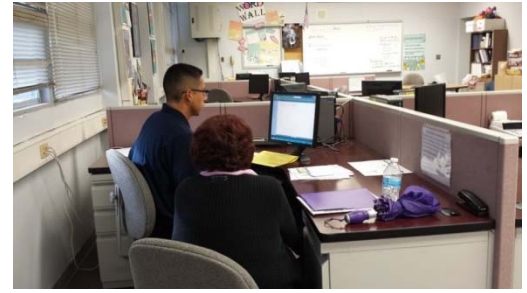


# Volunteer Roles



## Site Coordinator

- Provide coordination, organization and supervision for a Volunteer Income Tax Assistance Program site
- Ensure that all volunteers adhere to the city of Phoenix's VITA policies, IRS Volunteer Standards of Conduct and Quality Site Requirements
- Coordinate a schedule for volunteers
- Compile reports and volunteer hours on a monthly basis
- Complete site coordinator training
- Complete mandatory Volunteer Standard of Conduct and Site Coordinator Training
- **Complete advanced tax law training, including the use of electronic filing software**

## Tax Preparer

- Prepare basic or advanced 1040 tax returns and related schedules for eligible taxpayers
- Interview taxpayer to determine if all income, deductions and allowable credits are claimed
- Prepare only those returns for which certification levels were completed
- Complete mandatory Volunteer Standard of Conduct Training
- **Complete tax law training, including the use of electronic filing software**
- **Certified Public Accountant and Enrolled Agents can receive Continuous Professional Education (CPE) credits**

## Greeter

- Greet the taxpayers and sign them in
- Ensure the taxpayer has all the necessary documentation
- Monitors site traffic to ensure all taxpayers checking in receive assistance
- Complete mandatory Volunteer Standard of Conduct and Greeter / Screener Training

## Instructor

- Instructs tax law and tax preparation software
- Complete mandatory Volunteer Standard of Conduct Training
- Complete IRS Link & Learn tax law training and become certified in advanced
- Become familiar with the Link & Learn Practice lab
- Attend an instructor Train – the –Trainer class
- **Certified Public Accountant and Enrolled Agents can receive Continuous Professional Education (CPE) credits**

**We request volunteers to serve a minimum of 4 hours a week during tax season**