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[www.qcap.org](http://www.qcap.org)

## **VOLUNTEER GREETER AT TAX PREPARATION SITE POSITION DESCRIPTION**

### **CONTACT INFORMATION**

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### **LOCATION**

QCAP's Learning Links Technology Center, 1511 Hancock Street, Quincy, MA 02169.  
Accessible by MBTA Red Line, Quincy Center stop.

### **POSITION DESCRIPTION**

QCAP seeks volunteer greeters to welcome customers at QCAP's tax preparation assistance site and verify income and other documentation from taxpayers. Volunteer greeters provide assistance in accordance with IRS guidelines, and applicable QCAP policies. Other volunteers at the site provide free personal income tax counseling and tax form preparation assistance with a goal of helping low income people claim tax credits for which they may be eligible.

### **VOLUNTEER GREETERS RESPONSIBILITIES**

- Complete the Volunteer Standards of Conduct Training on Link and Learn.
- Welcome customers to QCAP's tax preparation assistance site. Verify customer identity, appointment time, and complete interview with customer about information pertinent to preparing the customer's tax return. Review income and other documentation provided by the customer to ensure that all paperwork necessary for the tax counseling session is complete and present at that time.
- Assist in collecting customer demographic data via QCAP intake form.
- Supervise flow of customers which includes greeting new arrivals, managing customers in the waiting area, and escorting customers to tax counselors.
- Handle inquiries from people who walk-in or call in with questions related to tax preparation.
- Refer customers with complex returns to the IRS web site or help number, or to a tax practitioner or firm.

- Strongly suggested that Volunteer Greeters complete basic and/or refresher tax law training and certification (16-30 hours) that is required for Volunteer Tax Counselors. Classroom training or Internet-based training will be provided.
- Maintain confidentiality of customer information.
- Adhere to Title VI by not denying service to anyone based on race, color, sex, age, national origin, or disability.

*Volunteers cannot accept pay or compensation for assistance provided. Volunteers cannot refer customers to any one particular tax practitioner or firm. QCAP maintains a list of area tax practitioners for customer referral purposes.*

## QUALIFICATIONS

1. Strong customer service and interpersonal skills, and desire to help people.
2. Ability to learn and apply IRS policies around verification of taxpayer identity and income documentation. Training will be provided.
3. Pride in performing tasks completely and accurately.
4. Ability to maintain taxpayer confidentiality.
5. Ability to work well with diverse populations.
6. Dependability and flexibility.

## TIME COMMITMENT

Prior to the start of tax season, volunteers must participate in a 3 hour volunteer orientation. It is strongly encouraged that volunteer greeters also successfully complete the IRS's web-based tax law training and certification program Link and Learn (about 20 hours) at their own pace.

During the tax season (January 28<sup>th</sup> through April 14<sup>th</sup>) tax counseling will take place on Thursday evenings and Saturdays. Ideally, volunteers will commit 2-4 hours weekly for the duration of the tax season. However, the minimum commitment is 8 hours monthly.

## SUPERVISION AND VOLUNTEER LIABILITY

Volunteers will be supervised while on site by an experienced Volunteer Site Coordinator. The Site Coordinator will be available to provide support, guidance, and answer questions.

Volunteers are covered under the Volunteer Protection Action of 1997, which can be found in its entirety at [www.irs.gov/individuals](http://www.irs.gov/individuals). "As long as the volunteer acts within the scope of the Volunteer Return Preparation Program, and has been certified by the IRS as a Volunteer Tax Counselor, they shall not be held liable for any harm caused by an act or omission on their part."

## BENEFITS TO VOLUNTEER

1. Rewarding volunteer experience, with the chance to help low income people claim eligible credits and maximize their income.
2. Opportunity to build skills.
3. Chance to meet other volunteers and build camaraderie among the counseling team.