



## VOLUNTEER JOB DESCRIPTIONS

### TAX PREPARER

Volunteers will review client documentation, interview the client, and prepare Federal and State income tax returns using computer software. Only basic returns will be prepared – no businesses, rentals, estates, trusts, etc. Volunteers are needed at their site at least once a week for a minimum of three hours. Volunteers must be comfortable with using a computer keyboard and mouse and have the ability to use Microsoft Windows type programs. Volunteers will complete a certification program. Volunteers have many technical support options to help them do their job accurately. Our accuracy rate is among the highest, accomplished by volunteers from all walks of life. **Because of 2010 tax law changes, new tax preparers are required to take an in-person training course and attain a minimum certification of Intermediate to prepare taxes.**

### INTERPRETER

Spanish/English bilingual interpreters are responsible for facilitating communication between the clients and the VITA site volunteers. Volunteers are needed at their site at least once a week during the tax season for a minimum of three hours. Other languages, including sign language, are welcome.

### ADMINISTRATIVE SUPPORT

Site Navigator Volunteers (3 specializations) are responsible for serving as the initial contact to the clients, helping coordinate the traffic flow, and ensuring that clients seeking service qualify for free assistance. Volunteers are needed at their site at least once a week during the tax season a minimum of three hours. No tax knowledge is necessary.

- Greeter/Support: Welcome, direct, and assist taxpayers; maintain crowd control; serve/refill coffee, water, snacks, etc.
- Intake/Survey: Develop necessary understanding to complete initial interview with client and fill out intake form; complete surveys with utmost accuracy for use in final reports
- Assets Specialist: Obtain training in pulling free credit reports and explaining document factually to taxpayers (no counseling/advice involved) so that they can read and understand it; obtain special training in opening bank accounts for taxpayers, get necessary documentation, filling out proper forms, helping clients understand they have the option to split their refund in up to three different accounts such as a checking, savings, and investment account, and communicating with bank representatives

### TECHNICAL SUPPORT

Volunteers who have more developed computer skills are needed from time to time to help with technical issues, generating reports and other light “electronic” maintenance.

### SITE MANAGERS

Site managers are responsible for the coordination of volunteers, all tax and admin operations, and reporting to the Coalition Coordinator of all performance at their sites. This position requires further training and a separate application, but does involve a small stipend for the responsible execution of the services at the site.

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## Descripciones de los trabajos de los Voluntarios

### PREPARADORES DE IMPUESTOS

Voluntarios repasarán la documentación de los clientes, entrevistarlos, y prepararán las declaraciones de los impuestos federales e estatales. Solamente declaraciones básicas serán preparadas—no de negocios, propiedades rentales, socios, etc. Voluntarios deben ser cómodos(as) usando una computadora con programas de Microsoft Windows. Voluntarios tienen que completar un programa de certificación. Voluntarios tienen muchas opciones de apoyo técnico disponibles para que cumplan su trabajo con exactitud. Nuestro porcentaje de exactitud es entre los más altos, cumplidos por voluntarios diversos. **Por los cambios de leyes de impuestos de 2010, nuevos voluntarios tienen que tomar un curso en persona y cumplir con una certificación a nivel intermedio.**

### INTERPRETE

Interpretes de inglés/español son responsables por facilitar la comunicación entre clientes y voluntarios en los sitios VITA. Otros idiomas, incluyendo lenguaje de señales, son bienvenidos.

### APOYO ADMINISTRATIVO

Voluntarios de apoyo son responsables por dar la bienvenida a los clientes, coordinando los demás servicios de los sitios, y ayudando en proveer el servicio de cuentas de banco en los sitios. No se requieren conocimiento de leyes de impuestos.

### APOYO TECNICO

Voluntarios con habilidades de computadoras son necesitados de vez en cuando para ayudar con asuntos técnicos, generando reportes, e otro “mantenimiento eléctrico.”

### GERENTES DE SITIOS

Gerentes de los sitios son responsables por la coordinación de los voluntarios, todas las operaciones administrativas, y reportando al Coordinador de la Coalición de todas las actividades del sitio. Esta posición requiere entrenamiento adicional y una aplicación, pero incluye una pequeña salario considerando las responsabilidades.

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