



**Position Title:** Greeter/Intake Volunteer

**This is a volunteer seasonal position**  
(January - April)

**Volunteer Position Description:** Greeters welcome taxpayers to a tax site and set the tone for their experience. As a greeter, you will provide taxpayers with the intake forms to be completed prior to tax preparation. You will also verify that they have proper identification, social security cards, and all necessary tax documents. Greeters are not required to certify in tax law, and they cannot answer tax law questions or give tax advice unless they have passed a tax law certification test. The Greeter may also provide the taxpayers with other resources/handouts for other program opportunities.

**Responsibilities:**

- Welcome residents to the VITA site;
- Provide taxpayers with intake forms and assist with completion of forms as necessary;
- Inform taxpayers of other agency-wide services available;
- Ensure that taxpayers have all necessary documents;
- Ensure the taxpayer qualifies for VITA assistance;
- Contact residents to schedule/confirm appointments;
- Makes copies of original documents (SS cards, W2's etc.) as needed;
- Maintain a sign-in sheet for orderly tax preparation process;
- Direct taxpayers to the next available tax preparer.

**Qualifications:**

- Be 17 years of age or older;
- Must complete and pass at minimum IRS "Basic" level training and certification test;
- Strong interpersonal and communication skills;
- Strong organization and crowd management skills;
- Excellent attention to detail;
- Bi-lingual a plus.