



Volunteer Positions 2019

Intake Coordinator:

You greet everyone visiting the site to create a pleasant atmosphere. You manage the sign in process, ensuring everyone has proper identification needed to complete their tax returns. You interact with potential taxpayers to determine eligibility and readiness to have their taxes prepared at a GRABC Site. You will also determine the type of tax return that needs to be prepared and the level of certification the tax preparer will need to have to assist this specific taxpayer. You must complete GRABC Intake Training and pass the required certifications; however, this role does not require you to prepare tax returns.
(VSC) (13614-C) (IRC 7216) (6744-B)

Tax Preparer:

You interact with the eligible taxpayers, provide free tax return preparation both Federal and State and answer tax law questions as you go. Getting to know the client and their personal situation, ensuring accuracy while seeking the maximum refund and encouraging them to save a portion of their refund. You must complete GRABC Intake Training, GRABC Advanced Tax Preparation Training, and pass the required certifications.
(VSC) (13614-C) (IRC 7216) (6744-A)

There is a need for volunteers to take the optional HSA course/certification. Many employers moved in the direction of high deductible health plans offering Health Savings Accounts to offset the cost of Insurance Premiums. If you wish to serve our clients who have Health Savings Accounts, you must take this course as well. **This is an Optional Tax Preparation Course and Certification** but you must be certified in either Basic or Advance before you can take this course and certification.
(HSA)

Quality Reviewer:



You're the final stop, review tax returns completed by volunteer tax preparers with the client, ensuring that every taxpayer receives top quality service and that the tax returns are error-free. Correct any errors, make sure nothing was missed, answer any questions the client may have, and converse about the savings initiative. Print copies for the client, and get signatures. You must complete GRABC Intake Training, GRABC Advanced Tax Preparation Training, GRABC HSA Training, GRABC Quality Review Training, and pass the required certifications.

(VSC) (13614-C) (IRC 7216) (6744-A) (HSA) (5299)

Site Coordinators & Co-Site Coordinators:

We couldn't do it without you! Manage a tax site, correspond with partners, recruit and work with volunteers, set up user accounts, transmit tax returns, work rejects, ensure all IRS requirements are met for quality tax preparation services, and have fun. You must complete GRABC Intake Training, GRABC Advanced Tax Preparation Training, GRABC HSA Training, GRABC Quality Review Training, GRABC Site Coordinator Training, and pass the required certifications.

(VSC) (13614-C) (IRC 7216) (6744-A) (HSA) (5299) (5088)

Savings Specialist:

You interact with the eligible taxpayers, listen, encourage, support, and help people create a savings plan and stick to it. Make tax time a money moment. Encourage people to save some of their refund. Promote the "Prepare2Prosper" savings initiative and "Save Your Refund" as well as offer financial products and services that will help people get control of their finances and plan for the future. You must complete the GRABC Savings Advocate Training and at minimum pass the required certification.

(VSC)