

KC CASH Volunteer Positions

Site Coordinator

The Site Coordinator is ultimately responsible for coordinating all facets of a VITA Site including the following: assuring that the correct procedures are being followed, managing volunteers, setting up the Site, transmitting returns, contacting clients concerning rejected returns, retransmitting corrected returns, maintaining IRS e-file Signature Authorization forms, filing information sheets, collecting data, and submitting data collection forms. The Site Coordinator must be comfortable with using a computer and have the ability to use Microsoft Windows-type programs. It is recommended that the Site Coordinator be familiar with completing their own or someone else's Federal income tax return prior to attaining this position. Site Coordinators are required to open and close each Site during normal hours of operation. Tax certification to the advanced level is required for this position.

Financial Specialist

The primary responsibility of the Financial Specialist is to help KC CASH clients understand the value of a relationship with a financial institution, whether that involves a mainstream institution (such as a bank or credit union) or a more specialized transactional account with an agency that targets low- and moderate-income taxpayers. The Financial Specialist will open accounts, either over the Internet or by telephone, for clients who choose to establish one of these relationships. In addition, the Financial Specialist matches clients with partner organizations that provide financial literacy, asset building, and family self-sufficiency programs. A Financial Specialist is needed at each designated site for a minimum of four hours each week during the tax season. Computer and Internet experience is required for this position. A background in financial education or financial services is helpful.

Greeter

The Greeter is responsible for serving as the initial contact to the client, helping coordinate the traffic flow, and ensuring that the client seeking service qualifies for free tax assistance. The Greeter has each client sign in and provides them with information sheets to be filed out. Greeters are needed at the Site a minimum of four hours each week during the tax season. No income tax knowledge is necessary for this position.

Information Assistant

The Information Assistant is the liaison for the client between the Greeter and the Tax Preparer. Responsibilities include gathering appropriate documentation for the Tax Preparer, reviewing the information sheets for completion, and providing appropriate data as noted on information sheets. Information Assistants are needed at the Site a minimum of four hours each week during the tax season. No income tax knowledge is necessary for this position.

Interpreter

Spanish/English Bilingual Interpreters are responsible for facilitating communications between the clients and the tax preparer. Bilingual Interpreters are needed at the Site a minimum of four hours each week during the tax season. No income tax knowledge is necessary for this position.

Quality Control Reviewer

Each income tax return must be checked by a Quality Control Reviewer prior to allowing the return to be accepted for transmission. As a minimum, all Social Security numbers and identification forms are reviewed on the income tax return as well as all input data (W2 forms, 1099 forms, interest, dividends, etc.). A check list must be completed and initialed by the Quality Control Reviewer. The Quality Control Reviewer must be comfortable with using a computer and have the ability to use Microsoft Windows-type programs. It is recommended that the Quality Control Reviewer be familiar with completing their own or someone else's Federal income tax return prior to attaining this position. Quality Control Reviewers are needed at the Site a minimum of four hours each week during the tax season. Tax certification to the advanced level is required for this position.

Tax Preparer

The Tax Preparer will review client documentation, interview the client, and prepare federal, state, and local income tax returns using computer software. Only individual returns will be prepared. Tax returns for businesses, rentals, estates, trusts, etc. will not be prepared. The Tax Preparer must be comfortable with using a computer and have the ability to use Microsoft Windows-type programs. It is recommended that Tax Preparers be familiar with completing their own or someone else's Federal income tax returns prior to attaining this position. Tax Preparers are needed at the Site for a minimum of four hours each week during the tax season. Tax certification to the intermediate level is required for this position.

Tax Coach

The Tax Coach assists taxpayers who choose to prepare their own returns under the assisted self-preparation model. The Tax Coach must be comfortable with using a computer and have the ability to use Internet tax programs. It is recommended that the Tax Coaches be familiar with completing their own Federal income tax returns prior to attaining this position. Tax Coaches are needed at the Site for a minimum of four hours each week during the tax season. Tax certification to the basic level is required for this position. (To choose this position, register as a Tax Preparer and choose one or more of the sites labeled as assisted self preparation.)