

Financial Empowerment Center and Volunteer Position Descriptions



VITA Site Coordinators will manage Volunteer Income Tax Assistance (VITA) sites including staffing, supplies, and site equipment. In addition to having all the responsibilities above they have the following additional duties: final quality review of all returns prepared at the site; manage staff; ensure operating procedure are being followed, ensure IRS guidelines are being followed; conduct final review on all returns; efile and transmit tax returns; address incomplete and rejected returns; and manage files in safe and secure manner. All site coordinators must have completed the Intake and Screening Certification, Site Coordinator Training, and Basic through Advanced Tax Preparation Certifications from IRS Link and Learn program.

VITA Intern – Assistant Site Coordinator (for college credit) will be trained for all of the above roles but will usually focus on tax preparation and one other area. VITA interns will also be trained on Quality Review and will conduct initial Quality Review of Tax Returns. Last year our VITA interns averaged 200 hours during tax season. All VITA Interns must have completed the Intake and Screening Certification, Site Coordinator Training, and Basic through Intermediate Tax Preparation Certifications from IRS Link and Learn program.

Volunteer Tax Preparer will prepare income tax returns for our VITA clients. They must be certified at the appropriate level so that all returns are prepared in scope. They will prepare accurate tax returns for our clients. The overwhelming majority of our volunteers will be certified at intermediate or above. All volunteers must complete at least the Basic Preparer Certification and the Intake and Screening Certification from IRS Link and Learn program. Only experienced and returning volunteers will conduct initial Quality Review. The majority of our volunteers will complete our Tax Academy. Our Volunteer Tax Preparers average approximately 45 hours of training.

Financial Aid U Coach will assist clients with preparation of the Free Application for Federal Student Aid (FAFSA). They will also help clients with other issues related to

college access. They will explain the benefits of obtaining a college degree and help with school selection, understanding of student loans and follow up with clients that need additional assistance. They will also promote other services and programs to the clients they assist. They must complete training on completing the FAFSA, training on FAU coaching techniques and objectives, and the Intake and Screening Certification from IRS Link and Learn program

Asset Building Coaches are volunteers follow up after the initial tax screening to identify client needs and also to promote and raise awareness of various programs and services. For example with unbanked clients they will explain the benefits of having a bank account versus using check cashiers and money orders. In addition they will promote savings and talk to clients about long term goals. They will encourage clients to come in to our credit labs and set up appointments with the credit counselor at the FEC. At sites where we do not have \$aveUSA they would promote the product and encourage those interested to go to one of the sites offering the product. They must complete the Intake and Screening Certification from IRS Link and Learn program.

Intake and Screening Coordinators will greet clients that come to the site for VITA or other services. They will identify which service they have come for, that they have all the necessary documents needed, and if they are coming for tax preparation that the type of tax return they need prepared is in scope with the VITA program. They will also ask clients if there are any additional needs. These volunteers will be the first to tell clients about other services such as \$aveUSA, Financial Aid U, Bank on Newark and other programs they may be eligible for. They must complete the Intake and Screening Certification from IRS Link and Learn program.