

Consider becoming a volunteer tax preparer through Community Action's Tax Preparation program.



What is the Tax Preparation Program? We provide valuable income tax preparation filing services to low- to moderate-income individuals at no cost. Last year, Tax prep volunteers helped the program prepare and file over 650 federal returns.

Why Volunteer? Each year, many hard-working individuals and families in our community count on the Tax Preparation Program's no-cost tax services. As a Tax Prep Program volunteer, you have the opportunity to make a difference in the lives. Being a volunteer is also a great opportunity to build resume skills and network with other like-minded volunteers. You will start off as a volunteer wanting to help, but as the season goes on, you'll become family.

The professionalism, care, consideration and willingness to go the extra mile for our clients that I've witnessed in my colleagues at Community Action is just extraordinary. We've always found a way to help everyone who comes through the door; somehow. Community Action is uncompromising in their commitment to quality.

~ Nancy, valued volunteer

Trainings will start mid December and continue until the end of January. Trainings will be offered during the day, evenings, and weekends to fit your busy schedule.

Contact Georgann Roth for more information on how to get involved.

Gerogann (402) 875-9320
groth@communityactionatwork.org

Community Action 210 O Street Lincoln, NE 68508

What Will I Be Doing? As a volunteer you will have opportunities to help those living in poverty by volunteering in one of the following roles:

Tax Preparer

Tasks: Prepare tax returns; identify missing information and request it from taxpayers. Ensure all taxpayer documents and private information are confidentially and securely stored.

Training: ♦ Volunteer Orientation/Standards of Conduct (1.5 hrs) ♦ Basic training (16hrs) or Advanced training (16hrs)

Intake

Intake Tasks: Interview taxpayers and review their forms and documentation and collect the information the Tax Preparers need to prepare the returns. Ensure that taxpayer documents and information are confidentially and securely stored. Identify certification level required for returns and identify any additional services needed.

Training: ♦ Volunteer Orientation/Standards of Conduct (1.5 hrs) ♦ Advanced training (16hrs) ♦ Intake training (8hrs)

Finisher

Finisher Tasks: Explain taxpayers' returns to them and get taxpayers' approval to e-file their returns or assist taxpayers in signing and preparing return packets for taxpayers to mail returns. Inform taxpayers that they are responsible for the information on their return. Provide taxpayers a "client copy" of their returns. Ensure that taxpayer documents are confidentially and securely stored.

Training: ♦ Volunteer Orientation/Standards of Conduct (1.5 hrs) ♦ Advanced training (16hrs) ♦ Finisher training (4hrs)

Greeter

Tasks: Greet all taxpayers visiting the site and direct taxpayers to their intake, finishing, or Financial Check-Up appointments. Greeters assist walk-in taxpayers in scheduling intake appointments. Greeters cannot answer any tax questions unless they have passed a tax certification.

Training: ♦ Volunteer Orientation/Standards of Conduct (1.5 hrs)

Interpreter

Tasks: Interpret for taxpayers and volunteers. Interpreters cannot answer any tax questions unless they have passed a tax certification.

Training: ♦ Volunteer Orientation/Standards of Conduct (1.5 hrs)

Administrative

Tasks: Scan taxpayer files into the tax software; Contact taxpayers with appointment reminders.

Training: ♦ Volunteer Orientation/Standards of Conduct (1.5 hrs) ♦ Scanning and Acuity software training (1.5hrs)

Financial Check-up

Tasks: Review taxpayers' credit reports with them, create credit improvement plans, encourage taxpayers to save part of their refunds, promote other Community Action services.

Training: ♦ Volunteer Orientation/Standards of Conduct (1.5 hrs) ♦ Financial check-up training (4 hrs)

**For training questions, please contact Andrew Ritta at 402-875-9351
or aritta@communityactionatwork.org**

**To Volunteer, contact Georgann Roth at 402-875-9320
or groth@communityactionatwork.org for more information**