



**Make Tax  
Time Pay!**  
Claim **ALL** the Tax Credits You Earned!

## Volunteer Description – Screener

### **Program:**

“It’s Money in Your Pocket” is a county-wide effort to offer free tax help to low and moderate income residents of Butler County. **Our goal is simple: to ensure that people file their taxes, take advantage of all the credits for which they are eligible and do not pay outrageous filing fees to commercial tax preparers.** The tax preparation sites will be located throughout the county. Volunteer Tax Preparers who have been trained by the IRS will prepare tax returns and file them electronically, so the filer can expect a quick refund. We will also offer banking services so filers who do not have a bank account can open an account and choose to have their returns deposited directly into their account.

### **Purpose of Position:**

To greet and screen all taxpayers to determine that they are financially eligible for the “It’s Money in Your Pocket” program, determine what type of tax assistance they will need and ensure that they have all necessary identification and tax information to complete their return.

### **Length of Appointment:**

Mid-January through April 15.

### **Responsibilities:**

- Greet all taxpayers visiting the site to create a pleasant atmosphere.
- Perform screening of all taxpayers:
  - ✓ Survey taxpayers to determine that they are financially eligible for “It’s Money in Your Pocket” and that their tax return is of the type that can be completed by the Volunteer Tax Preparers.
  - ✓ Ensure that taxpayer has brought the necessary information (e.g. identification, W-2, 1099’s, last year’s return) from which a tax return can be completed.
  - ✓ Complete taxpayer information sheet for Volunteer Tax Preparer’s reference.

- Maintain a sign-in sheet and assign tax payers to Volunteer Tax Preparers as they become available.
- Monitor site traffic to ensure that sufficient time is allowed for all taxpayers being checked in at the site to receive assistance.
- Consult with the site's Tax Expert regarding taxpayers with complicated returns to determine if they can be served at the site or should be referred somewhere else.
- Maintain confidentiality of taxpayer information.
- Provide general assistance to site patrons.
- Assist Volunteer Tax Preparers and the Site Coordinator as needed.

**Qualifications:**

- Basic tax knowledge is helpful but not necessary. Screeners are encouraged to visit the Link and Learn training sessions at [www.irs.gov](http://www.irs.gov). Screener training will be provided.
- Ability to deal with the public in a helpful and supportive manner.
- Good organizational skills
- Friendly, dependable and flexible.

**Support Available:**

- Orientation, training and on-site support will be provided by the Volunteer Site Coordinator.
- Technical support will also be available from the Internal Revenue Service.

**Time Required:**

Completion of short training prior to tax season. We request that each Screener volunteer for 3 sessions (2-4 hours for each session) throughout the tax filing season.