

CA\$H Greater Portland - Roles

Volunteer Scheduler

- Responsibilities: Provide high -quality assistance to all taxpayers, regardless of race, color, sex, age, national origin or disability, while maintaining the highest-level of client confidentiality. Cover the CA\$H phone line, receive and return scheduling calls, forward questions to tax site coordinator, schedule client appointments, mail/email intake packet.
- Training requirements: site flow, scheduling placement, Google Docs, mailing machine.

Volunteer Tax Preparer

- Responsibilities: Provide high-quality assistance to all taxpayers, regardless of race, color, sex, age, national origin or disability, while maintaining the highest-level of client confidentiality. Interview all tax filers, prepare tax returns, and provide ad-hoc quality reviews as needed. There is an opportunity to lead a mentee.
- Training requirements: VITA Tax Prep Advanced/Basic/HSA, site flow, VicNet.

Remote Volunteer Tax Preparer

- Responsibilities: Provide high-quality assistance to all taxpayers, regardless of race, color, sex, age, national origin or disability, while maintaining the highest-level of client confidentiality. Perform intake, securely scan and transmit appropriate documentation, schedule pickup, provide explanations at pickup.
- Training requirements: intake, VITA Tax Prep Advanced/Basic

Volunteer Asset Guide

- Responsibilities: Provide high-quality assistance to all taxpayers, regardless of race, color, sex, age, national origin or disability, while maintaining the highest-level of client confidentiality. Perform intake, check for correct documentation, promote asset building services, provide referrals and pull credit/unclaimed property reports.
- Training requirements: site flow, local Asset Organizer training, and VicNet.

Volunteer Greeter

- Responsibilities: Provide high-quality assistance to all taxpayers, regardless of race, color, sex, age, national origin or disability, while maintaining the highest-level of client confidentiality. Ensure clients are able to access the building, check-in clients, ensure client has proper ID, SS Card, and basic tax information.
- Training requirements: site flow, document training, and VicNet.

Glossary

- HSA: Health Savings Account. Additional VITA certification required to prepare these taxes.
- VicNet: online portal for volunteers to access schedules, signup for shifts, and view CA\$H news.
- VITA: Volunteer Income Tax Assistance program.
- Volgistics: online volunteer database.

