



UNIVERSITY OF MINNESOTA

Driven to Discover®

University of Minnesota Retirees Volunteer Center

VOLUNTEER OPPORTUNITY

AARP Client Facilitator Volunteers

AARP Tax-Aide, the nation's largest free, volunteer-run, tax preparation and assistance service, is seeking volunteers to add to its cadre of volunteers who assist taxpayers in need of help with preparing and filing their income tax returns. Client Facilitator (CF) performs check-in duties, provides an important first contact to the taxpayers, and manages taxpayers' initial activities. You do not need to be an AARP member to volunteer.

Description of volunteer duties:

As a Client Facilitator you will be a member of a team of volunteers assigned to a specific site. Your responsibilities will include:

- Welcoming taxpayers and seeing they are helped in an appropriate order by a Counselor
- Ensuring taxpayers have correct forms, documents, and personal identification required to accurately complete their tax return
- Assisting taxpayers in filling out portions of the Intake Booklet. The Client Facilitator may not address tax questions (unless you are also certified as a Counselor)
- Reviewing the taxpayer's Intake Booklet and alerting the site leader when a taxpayer's return may be outside of AARP Foundation Tax-Aide scope
- Assisting the site leader and tax counselors in maintaining an orderly file system of incoming and returning taxpayers and their status
- Distributing any appropriate literature to taxpayers
- Helping to make or confirm appointments as needed

Work assignments are typically 4 to 6 hours per day, one or two days per week, from the beginning of February through mid-April.

This is an unpaid position. Mileage expenses can be reimbursed if requested.

Training: Training involves several online training modules such as "What is Tax-Aide," "Policies and Procedures," "Security Essentials," etc. Additionally, there are two IRS required training and certification tests that are also done online: the IRS Standards of Conduct and Intake/Quality Review and the IRS Volunteer Standards of Conduct. These training modules and certifications are typically done in January and can be accomplished on a home computer.

Dates, times, and locations: The tax preparation season is February through mid-April). CFs travel locally to their assigned site, which is typically in an area as close as possible to where they live. Most sites are open starting at 9am or 10am and end for the day around 3pm or 4pm; a few sites may be open in the early evening hours. **Volunteers must commit to a**

minimum of one shift per week. Typically, volunteers do two days a week. If you have a vacation planned during tax season, your vacation plans can easily be accommodated. Various tax preparation sites are located throughout the Twin Cities and in out-state Minnesota. Volunteers will be assigned to a site in proximity to their home.

Volunteer skills and traits needed:

- Enter data accurately using a provided laptop computer
- Patience and understanding with persons having a wide range of physical, mental, and emotional characteristics
- Conflict resolution skills
- Ability to keep strict confidentiality
- Strong communication skills
- Team building skills
- Ability to work with others
- Dedication and commitment to Tax-Aide and its mission
- Ability to respect and work with others without bias
- Service oriented mind set
- Strong people skills

Physical expectations/limitations

- Must be able stand and/or to sit at a table for extended periods of time.
- Must be able to move unassisted throughout the site work area

What to wear: An official Tax-Aide shirt will be furnished to volunteers.

Parking, transportation, and food: Volunteers are responsible for arranging their own transportation to and from training facilities and the assigned preparation sites. Preparation sites have free parking or parking passes will be issued. Volunteers are responsible for their own snacks and lunches.

**Please indicate at registration whether you are a URVC/UMRA volunteer.*

 **Deadline for volunteer application: Immediate and Ongoing.**

To register for this activity

Click on the following link to sign-up:
[AARP Tax-Aide Facilitator Volunteer Sign-Up](#)

You may also contact the University Retirees
Volunteer Center,
by email (preferred) at URVC@UMN.EDU
or by phone at 612-625-8016

WANT TO LEARN MORE?

For more information on available
volunteer opportunities, contact the
URVC Office at urvc@umn.edu or 612-625-
8016