AARP TAX-AIDE CLIENT FACILITATOR (CF) POSITION DESCRIPTION

Program & Purpose of Position	AARP Tax-Aide provides free personal income tax assistance and preparation to low- and moderate-income taxpayers, with special attention to those age 60 and older. The Client Facilitator (CF) works with the AARP Tax-Aide site Local Coordinator/Site Manager (LC) and performs receptionist-type duties providing an important first contact for clients and keeping service orderly and efficient.
Responsibilities of Position	In accordance with by the policies and procedures of the AARP Foundation Tax-Aide Program, a CF: ➢ Welcomes clients and ensures they are helped in an appropriate order and checked off an appointment log or sequenced on the site sign-in sheet to be assisted by a Counselor. ➢ Ensures that each client has brought correct forms and documents required to accurately complete their tax return. ➢ Determines, with assistance of a site Counselor, when a client's return is outside of AARP Tax-Aide scope. ➢ Assists clients in filling out portions of the AARP Tax-Aide Intake Sheet and other required papers. The CF will not address tax questions (unless also happens to be certified as a Counselor). ➢ Keeps information (such as waiting time) flowing to clients who are in the waiting area. ➢ Ensures appropriate production data is entered on the site sign-in sheet by the Counselor /quality reviewer as each client departs, and before another client is served. ➢ May assist Counselors and the ERO in maintaining an orderly file system of client tax folders. ➢ Distribution any appropriate literature to clients. ➢ Complies with the Confidentiality and Security of Taxpayer data document. This document is included in the Counselor Digest, Technology Management Guide, Policy Manual, and Extranet.
Qualifications	The CF must receive annual training on program policies and procedures and agree to, by signing, the IRS Volunteer Standards of Conduct form. The CF must also be organized, personable, and enjoy working with people. The CF will need skill in dealing with clients that want immediate answers to their tax questions but will sometimes be required to wait for answers from a tax Counselor.
Length of Service & Eligibility	The CF is appointed for a one-year term and, contingent upon satisfactory annual review, may be re-appointed for subsequent one-year terms. The CF is eligible for other AARP or AARP Foundation volunteer positions.

Time, Training, & Travel	The position runs during the standard 1040 processing season from late January through April 15th. An average of at least one shift each week is required during this period. A typical shift takes four to five hours.
Training Required	Three hours of training by the LC will be required to become familiar with program policy, administrative matters such as site sign-in sheets and AARP Tax-Aide Intake and Quality Review Form, applicable site procedures, and orientation to the AARP Tax-Aide program.
Travel Required	The CF will not be required to travel except to work at the assigned sites.
Appointed By, Supervisor, & Scope of Authority	The CF is appointed and reports directly to the LC and does not supervise any other volunteer position.
Working Relations & Progress Review	The CF maintains a close working relationship with the LC and the tax Counselors working at the AARP Tax-Aide site. The LC monitors the CF's performance on an on-going basis and provides an annual performance appraisal.
Available Resources	AARP Tax-Aide reimburses CF for reasonable covered program expenses (usually just mileage) as set out in AARP Tax-Aide policy.
Volunteer Policy	AARP Foundation volunteers will receive equal opportunity and treatment throughout recruitment, appointment, training, and service. There will me no discrimination based on age, disabilities, gender, race, national or ethnic origin, religion, economic status, or sexual orientation.