

AARP TAX-AIDE COUNSELOR 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. Counselors, under the direction of the Local Coordinator, provide tax assistance and preparation service to clients.
Responsibilities of Position	<p>In accordance with the policies and procedures of the AARP Foundation Tax-Aide program, the Counselor:</p> <ul style="list-style-type: none">➤ Prepares tax forms and/or answers questions to the extent of his/her current tax training, at assigned tax assistance sites.➤ Explains tax returns prepared to taxpayers as taxpayers are responsible for the accuracy of the return.➤ Adheres to site schedules and guidelines.➤ Accepts no money or other gratuity for services.➤ Maintains the strict confidentiality and protects the security of all taxpayer information and records at all times.➤ Adheres to program policies and procedures especially the Counselor Guidelines and Confidentiality and Security of Taxpayer Data sections in the Counselor Digest.➤ Promotes and supports the AARP Tax-Aide program through word-of-mouth, ensures sites are well identified by AARP Tax-Aide posters and banners, and wears an AARP Tax-Aide name badge while serving at a site.➤ Records assistance given as outlined on the Site Sign-in Sheet.➤ Works well with diverse populations.
Qualifications	Counselors must pass the Advanced level of the IRS test to be certified by the IRS for the purpose of providing tax assistance in this program and agree to, by signing, the IRS Volunteer Standards of Conduct form.
Length of Service & Eligibility	Qualified Counselors (those passing the exam and signing the IRS Standards of Conduct) are certified for the tax season, and contingent upon satisfactory annual review, may be re-certified for subsequent seasons. The tax season is late January to April 15 (all year if assisting taxpayers through the program's website and through Oct 15 if assisting taxpayers beyond April 15 with questions or with late returns). Counselors are eligible for other AARP or AARP Foundation volunteer positions.

Time, Training, & Travel	Counselors volunteer at least an average of four hours a week during the tax season, usually from 2/1 to 4/15, plus 3-5 days of training in January. Counselors acquire tax knowledge through attendance at Counselor class. Counselors must also be trained in program policy and to properly record assistance given on the site sign-in sheet. Counselors travel locally to training and AARP Tax-Aide sites.
Appointed By, Supervisor, & Scope of Authority	Counselors are appointed to sites by a Local Coordinator after IRS certification and program policy and administrative training sessions are completed. Counselors report directly to the Local Coordinator and do not supervise any other volunteer.
Working Relations & Progress Review	Counselors work closely with taxpayers, Electronic Return Originators (EROs) when e-filing, and their Local Coordinator. Local Coordinators evaluate Counselors on an on-going basis.
Available Resources	Counselors will be afforded the necessary guidance, training and materials needed to fulfill their responsibilities. Additional support and training beyond that provided by Local Coordinators are provided from Instructors, EROs, and Technology Coordinators (if they e-file). AARP Tax-Aide reimburses volunteers for reasonable covered program related expenses as set out in the Policy Manual.
Volunteer Policy	AARP Foundation volunteers will receive equal opportunity and treatment throughout recruitment, appointment, training, and service. There will be no discrimination based on age, disabilities, gender, race, national or ethnic origin, religion, economic status, or sexual orientation.