

VITA VOLUNTEER JOB DESCRIPTION

VOLUNTEER INCOME TAX PREPARER

Purpose of Position: provide FREE tax return preparation to persons eligible for service (i.e., those earning less than \$50,000 per year, persons with disabilities, non-English speaking and the elderly.)

Responsibilities:

- Provide high-quality assistance to all taxpayers. Prepare taxpayer's return based on information provided by the taxpayer or answer tax related questions.
- Identify all returns with the site identification number assigned to the site.
- Interview taxpayer to determine if all income, deductions and allowable credits are claimed.
- Prepare tax returns using IRS-provided software.
- Prepare only those tax returns for which training was provided.
- Refer taxpayers with complex returns to the IRS walk-in office, website or help number or to a tax practitioner or firm.
- Ensure no compensation of any kind is accepted for the services volunteers provide.
- Maintain confidentiality of taxpayer information.
- Ensure on-site quality review is performed on completed returns prior to taxpayer signature.
- Ensure a copy of the completed return is provided to the taxpayer.

Qualifications:

- Attend either 16-hour training (two 8 hour sessions) or utilize Link & Learn online training system (If returning volunteer, must re-certify for current tax year.)
- Successfully pass certification test
- Willingness to share time, skills and interest
- Basic computer skills for inputting tax return information
- Pride in performing tasks completely and accurately
- Ability to work with the public in a helpful and supportive manner.
- Friendly, dependable and flexible