

## **Job Description**

**Job Title:** VITA Volunteer Tax Preparer  
**Division:** Community Services  
**Effective Date:** October 2021  
**Exemption:** Volunteer

### **Position Summary:**

To provide free tax return preparation for eligible taxpayers. The volunteer is committed to provide high quality service and uphold the highest ethical standards in order to establish and ensure the greatest degree of accuracy and public trust.

### **RESPONSIBILITIES:**

1. Attend tax law training or complete online self-study preparation, including the use of electronic filing software, and obtain all necessary certifications.
2. Provide high-quality assistance to all customers. Directly prepare customer's return based on information provided by the customer or having the customer answer tax related questions.
3. Interview customer to determine if all income, deductions and allowable credits are claimed.
4. Prepare only those tax returns for which training and certification were provided.
5. Prepare tax returns using electronic filing software.
6. Refer customers with complex returns to Site Coordinator for referral to IRS website or help number.
7. Ensure no compensation of any kind is accepted for the volunteer services provided.
8. Maintain confidentiality of customer information

9. Ensure quality review is performed on completed returns prior to being returned to customer.

10. Ensure a copy of the completed return is provided to the customer.

**QUALIFICATIONS:**

1. Available during the dates and times the volunteer tax site will operate from mid-January through April.

2. Available to attend tax preparation training in mid-December and/or early January and successfully pass the IRS Certification prior to the start of tax preparation season.

3. Possess intermediate computer skills and tax knowledge, i.e., Form 1040 and all supporting schedules.

4. Able to perform tasks completely and accurately.

5. Able to interact with the public in a helpful and supportive manner.

6. Possess interviewing skills, or participate in interviewing skills training as needed.

If you're interested in applying for this position, contact  
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