

Volunteer Tax Preparer Job Description

As a volunteer tax preparer in La Casa de Esperanza's Volunteer Income Tax Assistance (VITA) program you will be assisting clients, by electronically preparing their Federal & State tax returns, using an online system called TaxSlayer. With the TaxSlayer system, we have online and live phone support that is very helpful. We also have live support through the Wisconsin Department of Revenue and IRS Department to assist us with any questions or concerns that may arise. At La Casa our volunteers come together to help each other out to make sure we give our clients the best tax experience possible. Here are the duties a VITA volunteer is required to perform:

Roles:

Volunteers have a responsibility to provide free high quality Tax Preparation service for eligible taxpayers, by establishing the greatest degree of public trust and upholding the highest of ethical standards.

Tasks:

- Attend new and/or refresher tax law training and certification as needed, including the use of electronic filing software.
- Successfully pass the Standards of Conducts test
- Pass IRS Tax Certification
- Interview client & review Intake sheet to determine if all income, deductions and allowable credits are claimed.
- Directly prepare taxpayer's return based on information provided by taxpayer and answer some tax related questions. Provide high-quality assistance to all taxpayers.
- Prepare only those tax returns for which training and certification were provided and completed.
- Refer customers with complex returns to the Site Coordinator
- Maintain confidentiality of client information.
- Run Diagnostics before quality review is done.
- Ensure on-site quality review is preformed & checked off on Intake sheet on completed returns before creating the e-file.
- Ensure a copy and full review of the completed return is provided to the taxpayer.
- Adhere to Title VI by not denying service to anyone based on race, color, sex, age, national origin, or disability.

Skills:

- Basic computer skills
- Tax training and certification will be provided
- Willingness to be Friendly, Dependable, Flexible, and a Team-Player.
- Volunteer a minimum of 3 to 4 hours per week for the Volunteer Tax Program from approximately Mid-January through April 15. (VITA's peak time is Mid-January through the end of February)
- Pride in performing tasks completely and accurately.
- Deal with the public in a helpful and supportive manner, including customer service skills.