

Volunteer Income Tax Assistor Position Description

The Volunteer Income Tax Assistance (VITA) Program offers free tax help to people who cannot afford paid professional assistance. Volunteers will prepare basic tax returns using software for taxpayers with low to moderate incomes. Assistance is provided at community and neighborhood locations.

Volunteer's Responsibilities:

- Attend basic and/or refresher tax law training as needed, including the use of electronic filing software.
- Successfully pass a test (open book) on required tax law knowledge.
- Provide high-quality tax return preparation assistance to all taxpayers. Directly prepare taxpayer's return based on information provided by taxpayer or answer tax related questions.
- Interview taxpayer to determine if all income, deductions, and allowable credits are claimed.
- Prepare only those tax returns for which training was provided.
- Prepare tax returns using electronic software (whenever possible).
- Refer taxpayers with complex returns to a tax practitioner or firm. However, volunteers should never refer taxpayers to a specific practitioner or firm.
- Ensure no compensation of any kind is accepted for the volunteer services provided.
- Timely complete and submit required statistical reports.
- Maintain confidentiality of taxpayer information.
- Ensure on-site quality review is performed on completed returns prior to being returned to taxpayer.
- Ensure a copy of the completed return is provided to the taxpayer.

Volunteer's Qualifications:

- Basic tax knowledge, although not required (Form 1040, Form 1040A and Form 1040EZ). Basic tax training will be provided as needed.
- Basic computer skills for inputting tax return information.
- Ability to deal with the public in a helpful and supportive manner, including good interviewing skills. Interviewing skills training will be provided as needed.
- Friendly, dependable and flexible.

Training and/or Resources to be Provided:

- Orientation, training and on-site support will be provided by the Volunteer Site Coordinator.
- Technical support will also be available from the Internal Revenue Service.

Time Estimate:

The exact volunteer time required depends on specific responsibilities, number of other volunteers assigned to the volunteer site, size of the VITA site and volume of traffic. Time will also be required during November, December or January to attend a basic or refresher tax law course, including the use of electronic filing software.

Benefits:

- Personal satisfaction in being able to assist a family in getting money or fulfilling a government requirement at no cost.
- Increased knowledge of tax law has many personal financial benefits.