

TCL Core Values...

Respect

Collaboration

Focus on Results

Your essential place to
thrive in a changing world

We connect you with
resources, people and

Volunteer Position Description

Tax Preparer/Quality Reviewer

Purpose of Position: Serve community tax return needs by providing free, IRS certified, tax return preparation and filing. Directly assist hundreds from the community with their tax returns.

Qualifications : Ability to complete IRS online training/certification and VITA (Volunteer Income Tax Assistance) and Tax Software program specific training. Ability to follow direction/rules, work independently and work with team. Ability to learn/use a few Google Workspace applications. Need attention to detail and accuracy; discretion and confidentiality. Ability to work from home/remote and provide online access using person internet. Eventually, work some time at Site (TCL auditorium) with client interaction. Spanish capability can be useful, but not required.

Responsible To : VITA Site Coordinator, TCL Volunteer Coordinator

Responsibilities :

1. Complete online IRS tax training and certification (tests). online
2. Prepare tax returns, supported by reference materials, on-line research, and experienced volunteers. (Tax return accuracy is ensured through a 2 step process, with at least 2 tax preparers involved in every tax return). online, phone
3. Prepare returns in a timely manner. online, phone
4. Tax season coordination and on-going training with weekly ZOOM sessions. online, recorded
5. When ready, interact with tax clients to intake their tax info and to review/sign completed returns. Site (TCL Auditorium)
6. When ready to advance (maybe future years), train for advanced certification level for more complex returns. Also, with experience, opportunity to advance to quality reviewing returns, and mentoring new volunteers. online
7. Adhere to IRS VITA volunteer policies and guidelines, including those for Privacy, Confidentiality and Civil Rights.
8. Log volunteer time. online
9. Log tax return preparation process status. online
10. Support Site set-up/take-down of equipment and tables (when at Site).
11. Encourage community members to use library services and programs. Encourage new volunteers and donor/funding support of the library.

Training Provided : TCL volunteer orientation/training. Mentoring (individual assigned to support new preparers). Online IRS tax law training/certification. Reference documents, 2 training classes (ZOOM). Tax preparation software training/practice lab. Site training on-the-job, when ready). Tax season continual learning (ZOOM) and emails. Return oversight by quality reviewer also provides feedback on returns prepared.

Time Commitment : Training/cert time required is based on individual needs, 250 hours, December to mid-February. Tax Season time needs vary, nominally 4-7 hours/week. See [2023 Teton VITA Site Calendar](#) (or tclib.org/tax) for dates. There is flexibility for time volunteered due to both client traffic variations, and to support volunteer personal schedule demands. Self-defined participation.

Length of Commitment: December/January through April 13. (Most volunteers return year after year!)

Benefits of Volunteering: Materially assist our community with their taxes. (Clients are respectful and so very thankful, positive environment.) Work with collegial, supportive team of experienced volunteers. Interact with supportive library/library staff. Learn useful tax law for personal life. Prepare self/friends/family tax returns.

Contacts : TCL Volunteer Coordinator (volunteer@tclib.org), VITA Site Coordinator (tvitasc@gmail.com), VITA volunteers

Further Details: See [Tax Preparer's Job Supplemental Details](#) (at tclib.org/tax) for more understanding and upcoming tax season unique items.

Application: [Click here to complete and submit an application](#) . We will then contact you to coordinate.