

VITA Volunteer Tax Preparers' Job Description 2018

Volunteer Income Tax Assistance (VITA) is an IRS certified program preparing volunteers to process and prepare low and moderate income taxes, free of charge.

General

- *Wonderful* team of volunteers, working together to help the community in a truly significant way
- No tax experience required, (just need to be willing to study/learn)
- Study at home using internet-based training program
- 1-3 training sessions at Teton County Library (TCL) in January
- Prepare taxes using powerful tax preparation software (similar to TurboTax, etc.)
- On-going email communications provide study/learning information and program information throughout learning and tax season
- Tax preparation: January 31 through April 14—***volunteer participation is flexible!***
 - See 2018 VITA Calendar for detailed times
 - Prepare taxes at either or both types of sessions:
 - Wednesday eves: prepare taxes with clients participating, one-on-one, at TCL auditorium
 - Drop-off sessions: preparation is self-paced; prepare taxes from client info/documents received through an “intake” process, at TCL computer lab
 - Tax return accuracy/quality is ensured through a 2 step process, with 2 tax preparers involved in every tax return
 - Many volunteers miss some sessions for travel, other obligations. Some volunteers only do Wednesday eve sessions, some only drop-off, some both. Participation adequate for proficiency and value-added/contribution to the program is expected.
- TCL Friends provide **great snacks** (more like meals) for volunteers, at all auditorium sessions

??still interested?? Then continue to next page for detail

MORE QUESTIONS? NEED TO TALK? You are welcome to contact Grace M. Robertson, site-coordinator, at gmrobertson@bresnan.net or call at (307) 733-5395.

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More Details / Job Description:

- Self-study using IRS's on-line [Link and Learn e-learning](#) at home, available December through tax season. Some documentation also supports study (avail at TCL in Dec). *This is how you learn tax law and tax return preparation. It includes practice tax return preparation using tax software. Study/test time varies by individual: 40 – 80 hours estimated over December/January timeframe.*

-Access and user directions will be provided by email

-Training sessions in January at TCL. These sessions will *teach our site processes, focus on more complex materials, and provide total program perspectives*. Additionally, new tax preparers will need to drop-in to the computer lab for *tax software practice and one-on-one learning, as needed*.

- All must sign agreement to our Standards of Conduct before interacting with clients. You must pass and Intake/Quality review test, and pass a tax preparer certification test before doing tax preparation. There are two levels of tax preparer certification: BASIC and ADVANCED. (Other certifications are available for specialized topics.)

- Tests are “open book/open computer” and self-paced.

- Use of reference materials is encouraged for all aspects of program. You are not expected to memorize everything-but must know when/how to look it up or when to ask someone. Reference material will be provided, and used throughout study and tax preparation.

-In general, the goal should be to have passed a certification test before the first tax prep session, January 31.

- Some cannot make this goal (for many reasons) and are encouraged to continue to work towards certification as soon as possible. You can study, observe and practice as tax season “spins-up” in February.

- Your learning applies year-to-year, so if you happen to start and cannot get through certification, then come back next year! (To any extent you progress, you will have learned life-valuable tax information---and be further along next year.)

- DON'T BE INTIMIDATED. This is a very doable learning process, if you are committed to learning and diligent. The most intense effort involved will likely be in January, as you complete studies/certify at home, and attend training sessions.

- New preparers must observe taxes being prepared before working directly with clients. When comfortable/ready, there will be assistance available as you begin working directly with clients.

- All tax returns must be Quality Reviewed prior to completion. (A process whereby another, experienced, tax preparer reviews the entire return to ensure accuracy and completeness.) New tax preparers continue to learn, and we all avoid errors, through this process, without putting client at risk.

-Added benefit: you may prepare your own/family/friends' tax returns.