

Volunteer Job description

Title

VITA Volunteer Income Tax Preparer

Responsibility to

Coordinator of Volunteers or VITA Site Coordinator, as designated

Definition of Duties

As a member of the VITA team, to work collaboratively to ensure families receive necessary assistance in tax preparation. As a Tax Preparer, to assist working families with their tax returns during the tax season.

- To prepare correct and accurate basic 1040 tax returns and related schedules for taxpayers based on information provided by the taxpayer.
- To answer related questions.
- To ensure proper submission of electronic tax return.
- To ensure that qualified families apply for the Earned Income Tax Credit (EITC).
- To provide the taxpayer with a copy of the completed return.
- To maintain confidentiality of taxpayer information.

Length of Commitment

Variable. Minimum commitment of three months during tax season preferred.

Time Required

Variable. 2-4 hours per week or as assigned during tax season.

Qualifications

Ability to maintain confidentiality.

Ability to work collaboratively on a volunteer team.

Facility with technology and computer software.

Willingness to comply with Catholic Charities values and ethical standards.

Training Provided

Tax preparers are required to complete and pass IRS tax law and tax software training.

Orientation to Catholic Charities *Paths of Hope*: Out of Poverty Initiative.

Evaluation

Yearly or at end of tax season, as applicable.

Importance of the Job to the Organization's Purpose

Your efforts will ensure that working families do not pay expensive tax preparation fees and are able to keep the money to which they are entitled. You will also help families claim tax benefits which can boost a working family's income up to 35 percent.

Volunteer Job description

Title

VITA Volunteer Screener

Responsibility to

Coordinator of Volunteers or VITA Site Coordinator, as designated

Definition of Duties

As a member of the VITA team, to work collaboratively to ensure families receive necessary assistance in tax preparation. As a screener, to provide a friendly and welcoming atmosphere while checking that families have the necessary personal finance information on hand for volunteers to assist them with their returns.

- To perform a screening process of all taxpayers to determine the type of assistance needed.
- To ensure that the taxpayer has brought all necessary information (e.g. W-2, 1099s, last year's returns, etc) to complete their returns.
- To monitor site traffic to ensure that sufficient time is allowed for taxpayers being checked in to receive assistance.
- To maintain confidentiality of taxpayer information.

Length of Commitment

Variable. Minimum commitment of three months during tax season preferred.

Time Required

Variable. 2-4 hours per week or as assigned during tax season.

Qualifications

Willingness to take IRS free training.

Ability to maintain confidentiality.

Ability to work collaboratively on a volunteer team.

Facility with technology and computer software.

Willingness to comply with Catholic Charities values and ethical standards.

Training Provided

Tax preparers are required to complete and pass IRS tax law and tax software training.

Orientation to Catholic Charities *Paths of Hope*: Out of Poverty Initiative.

Evaluation

Yearly or at end of tax season, as applicable.

Importance of the Job to the Organization's Purpose

Screeners play a vital role by ensuring that working families get the help and services they need to improve their financial well-being.

Volunteer Job description

Title

VITA Volunteer Site Coordinator

Responsibility to

Coordinator of Volunteers

Definition of Duties

As a member of the VITA team, to work collaboratively to ensure families receive necessary assistance in tax preparation. As a Site Coordinator, to maintain effective operations at the VITA site.

- To ensure VITA site is maintained in an organized and efficient manner.
- To ensure that the VITA site and volunteers uphold the proper standards of quality in order to create a positive experience for taxpayers and their families.
- To establish a Quality Review process for the VITA site, ensuring that all Tax Preparers are aware of the site's Quality Review process.
- To provide feedback to Tax Preparers regarding tax prep errors and adherence to site quality procedures.
- To develop and maintain a schedule for volunteers.
- To perform other administrative duties as necessary.
- To ensure maintenance of confidentiality regarding taxpayer information.

Length of Commitment

Variable. Minimum commitment of three months during tax season preferred.

Time Required

Variable. 2-4 hours per week or as assigned during tax season.

Qualifications

Previous VITA experience required

Ability to work collaboratively on a volunteer team.

Ability to complete and pass IRS tax law and tax software training.

Willingness to comply with Catholic Charities values and ethical standards.

Ability to maintain confidentiality.

Training Provided

Tax preparers are required to complete and pass IRS tax law and tax software training.

Orientation to Catholic Charities *Paths of Hope*: Out of Poverty Initiative.

Evaluation

Yearly or at end of tax season, as applicable.

Importance of the Job to the Organization's Purpose

Your efforts will ensure that the VITA site works efficiently to help families claim valuable tax benefits.

Volunteer Job description

Title

VITA - EITC Volunteer Instructor

Responsibility to

Coordinator of Volunteers

Definition of Duties

As a member of the VITA team, to work collaboratively to ensure families receive necessary assistance in tax preparation. As an instructor, to deliver the tax law training and certification courses necessary for operation of VITA sites.

- To teach VITA volunteers about tax law, interview techniques and operation of software for the VITA program.
- To teach volunteers how to recognize eligibility and process Earned Income Tax Credit (EITC) for families.
- To instruct volunteers on the process of filing returns and maintaining confidentiality requirements.

Length of Commitment

Variable. Minimum commitment of one year preferred.

Time Required

Variable. 2-4 hours per week or as assigned during tax season. Additional time is required in order to complete specialized trainings and obtain levels of certification.

Qualifications

Previous VITA experience and special IRS instructor training required.

Ability to work collaboratively on a volunteer team.

Willingness to comply with Catholic Charities values and ethical standards.

Ability to maintain confidentiality.

Training Provided

Previous VITA experience and special IRS instructor training required

Orientation to Catholic Charities *Paths of Hope*: Out of Poverty Initiative.

Evaluation

Yearly.

Importance of the Job to the Organization's Purpose

Your efforts will ensure that VITA volunteers are adequately equipped with the skills and knowledge they need to help families claim valuable tax benefits.