

## **Trident Area VITA Coalition Volunteer Job Descriptions**

The mission of the Trident Area VITA Coalition (TAVC) is to provide volunteer income tax assistance (VITA) tax preparation services and asset-building education and opportunities for all low to moderate income families in the tri-county area (Berkeley, Charleston and Dorchester counties).

TAVC provides services to individuals at locations throughout the tri-county area. The program not only provides free tax preparation and electronic filing services, but also increases awareness of the Earned Income Tax Credit (EITC) and other asset building opportunities.

**YOU CAN HELP! The TAVC has opportunities for volunteers for the upcoming tax season.**

- ❖ All volunteers will receive free training and free certification provided by the IRS
- ❖ Time commitment for volunteering is flexible depending on your schedule.
- ❖ Each position requires direct interaction with people from diverse backgrounds.
- ❖ Volunteers must provide own transportation to site location where they will be volunteering

Interested parties should have the following skills:

1. Tax/ tax law background useful, but not necessary (training will be provided)
2. Customer service skills
3. Computer skills
4. Ability to deal with diverse population
5. Willingness to commit a minimum of 2 - 4 hours one or more days a week beginning mid- January through April 17<sup>th</sup>.
6. Willingness to help the community

### **Site Coordinator/E-Filer**

Volunteer Commitment: January –April 17 (Specific schedules will be assigned to each volunteer during this period)

Requirements: Senior Position, experienced in tax preparation either in a VITA program or as a paid preparer.

Duties:

1. Responsible for coordinating other tax preparers & greeters at their site
2. E-Files all tax returns electronically for all tax preparers, either from the site or as soon as possible after the site shift ends.
3. Prepares basic, intermediate or advanced tax returns and reviews tax returns by others.
4. Provides follow-up on e-filed tax returns that have been rejected by the IRS. Correct and file return again.
5. Reviews all returns for accuracy prior to submission.

### **Tax Preparer**

Volunteer Commitment: January –April 17 (Specific schedules will be assigned to each volunteer during this period)

Requirements: 4, 3-hour trainings (12 hours total) provided by Trident Urban League

Duties:

1. Prepares basic and intermediate tax returns
2. Files returns electronically.
3. Reviews tax returns prepared by other tax preparers.

### **Quality Reviewer**

Volunteer Commitment: January –April 17 (Specific schedules will be assigned to each volunteer during this period)

Requirements: Senior Position, experienced in tax preparation either in a VITA program or as a paid preparer.

Duties:

1. Provides follow-up on e-filed tax returns that have been rejected by the IRS. Correct and file return again.
2. Reviews all returns for accuracy prior to submission.

### **In-take Specialist**

Volunteer Commitment: January –April 17 (Specific schedules will be assigned to each volunteer during this period)

Requirements: 4-hour training provided by Trident Urban League

Duties:

1. Greets clients coming into the sites and maintains sign-in sheet.
2. Assists in gathering preliminary information on intake sheet
3. Ensures that individuals have the proper taxpayer documents in order to receive services (W-2's, SSA cards, etc.)
4. Maintains and tabulates client satisfaction surveys completed after clients receive service.
5. Answers taxpayer questions about site procedures and services available at site.

### **Computer Technologists:**

Volunteer Commitment: November-December 2011 and January – April 17, 2012

Requirements:

- Prior computer hardware and software training
- Completion of the IRS online Link and Learn Basic Course
- Expertise in Microsoft operating systems (Windows XP and Vista)

Duties:

November-December

1. Check out and tune up all coalition owned laptop computers.
2. Install software program, TaxWise on all laptops, both company owned and volunteer's personal laptops.
3. Install antivirus programs on company laptops. Install printer drivers on all laptops. Assist Vita coordinator with developing a security plan to protect tax client's personal information.

January – April

1. Assist site coordinators with technical issues involving computers, printers and network access.
2. Assist all site coordinators and tax preparers with removal of all 2009 tax returns from laptops, after April 17<sup>th</sup>.

**If interested in volunteering, please contact Jack Bennett at Charleston Trident Urban League at 843-965-4037 or 843-708-8300**