



WHAT IS VITA?

(Volunteer Income Tax Assistance Program)
NO EXPERIENCE NECESSARY
TRAINING IS PROVIDED.

Volunteer to help your community by preparing taxes free of charge for low income families in South County!
This is a volunteer driven service with LOCATIONS IN VENICE, ENGLEWOOD, and NORTH PORT

Benefits of Volunteering

- Many volunteer positions available
- Multiple site locations and schedules
- Ability to volunteer based on your schedule
- Gain soft skills as well as technical tax law knowledge
- Opportunities for new and experienced volunteers

Greeter / Screener

Return Preparer

Quality Reviewer

Site Coordinator

- Email or call United Way of South Sarasota County. Jackie Dean will send you our Volunteer Application to be filled out. programs@uwssc.com 941-484-4811 x 103
- Training materials will be available in November.
- Training will start in January before tax season starts.

POSITIONS NEEDED: (below) **Or Visit:** uwssc.org/free-tax-help

Greeter / Screener

- Acts as a receptionist to welcome clients to the site.
- Makes sure that clients are served in the order they arrived.
- Ensures that taxpayers meet VITA program guidelines, signs them in, and indicates what type of returns need to be completed.
- Checks to make sure taxpayers brought all the required identifications and tax documents/information that the preparers need in order to complete a tax return.
- Makes sure that taxpayers' *Intake/Interview & Quality Review Sheet* is properly completed and asks follow-up questions to clarify any unclear circumstances when necessary. Helps taxpayers fill out the form and ITIN application if needed.
- Refers taxpayers to get help at the appropriate local offices or organizations if their returns are out of scope for VITA.
- Monitors site traffic to ensure that sufficient time is allowed for all taxpayers being checked in at the site to receive assistance. If not sure when to stop taking/signing in taxpayers, consult with the site coordinator.
- If you also speak a language that some of the taxpayers speak, you may be asked to help with translation when needed.
- Maintains confidentiality of taxpayer information.

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Tax Preparer

- Required to pass the online IRS certification(s) at least at the Basic level. Intermediate and Advanced levels are recommended.
- Makes sure that taxpayer's *Intake/Interview & Quality Review Sheet* is properly completed based on information the taxpayer provides and asks follow-up questions to clarify any unclear circumstances when necessary.
- Put initials on the *Intake/Interview & Quality Review Sheet* so the quality reviewer knows who prepared the tax return in case the quality reviewer has questions or needs to clarify things on the return.
- Ensures that all reportable income is reported on the taxpayer's return(s) and that all allowable/eligible deductions and credits are claimed for the taxpayer.
- Prepares accurate federal and state tax returns for qualified taxpayers only based on information provided by the taxpayers.
- Prepares only tax returns within the scope of training and certification level(s). A preparer should not prepare a tax return that is out of the scope of his or her certification level(s). If a preparer prepares an out of scope return and makes a mistake on it, then the preparer would be responsible for his or her own mistake.
- Answers basic tax-related questions and refers taxpayers who have complex (out of VITA's scope) tax returns to the appropriate organizations or offices, such as AARP, Account Ability MN, paid professional tax services (no specific name), and the IRS or MN-Revenue, for assistance.
- Backs-up the taxpayer's information into the appropriate device, places the device along with taxpayer's identifications and information in the VITA envelope, and places the envelope in the designated bin for quality review.
- Maintains confidentiality of taxpayer information.
- When in doubt, refer to training materials or ask questions.

Quality Reviewer

- Required to pass the online IRS certification at Basic and Intermediate levels and at least one filing season of tax return preparation experience.
- Timely reviews returns prepared by tax preparers for accuracy and completeness to fulfill quality standards.
- Makes sure all the boxes under Section C (To be Completed by a Certified Quality Reviewer) of the *Intake/Interview & Quality Review Sheet* are properly verified and checked.
- Ensures on-site quality review is performed on every completed return prior to printing and returning a copy to the assistor/assembler or taxpayer(s).
- Provides feedback regarding common errors made on tax returns prepared at the site for future quality improvements.
- Serves as a back-up to tax preparers and prepares tax returns when needed.
- Assists the site coordinator in answering tax-related questions during service hours.
- Maintains confidentiality of taxpayer information.

Site Coordinator:

- Required to pass the online IRS certification at Basic, Intermediate, and Advanced levels.
- Keeps track of volunteer certification level(s), creates and maintains schedules for volunteers, and assigns volunteers to the appropriate sites.
- Ensures that supplies and equipment are adequately provided at each site.
- Informs volunteers and site partners about any new and relevant site or tax law updates.
- Stays current with the TaxSlayer program update by installing new and significant updates into site computers to ensure that the program is properly working.
- Makes sure that the sites are in compliance with all federal (IRS) and state requirements.
- Meets with site partners/stakeholders before and after the tax filing season to plan for and reflect on the season.
- Acts as a liaison between the volunteers, sites partners/sponsors/stakeholders, and addresses any relevant questions or concerns that may arise.
- Monitors the sites to ensure that quality review is being conducted, confidentiality is being maintained, the Site Identification Number is being annotated on each return, and sufficient time is being allowed for all taxpayers being checked in at the site to receive assistance.
- Addresses volunteers and taxpayers' questions about the sites and tax-related laws/issues when needed.
- After each tax session, put all the supplies and equipment away if needed, save or back-up all the tax information/data to the appropriate device for transmission, and makes sure that all the information are deleted from the computers before leaving the site.
- Ensures that all tax returns are electronically filed with the state and IRS in a timely manner and that acknowledgements are being reviewed or confirmed.
- Makes sure that rejected returns are either corrected or resolved and that the appropriate taxpayer(s) are contacted/informed if needed.
- At the conclusion of the filing season, makes sure that volunteers get their certificates and works with site partners/sponsors/stakeholders to hold recognition event(s) or ceremony(ies) for volunteers if funding is available.