

# VITA Volunteer Tax Preparers' Job Description 2019

## Sublette County

*Volunteer Income Tax Assistance (VITA) is an IRS certified program preparing volunteers to process and prepare income taxes for those in need in our community, 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
- 2 training classes in January, dates and locations TBD (volunteers will help determine)
- 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: February 1 through April 12 (volunteers will help define tax prep session dates/times)
  - Prepare taxes with clients present, and/or prepare from "dropped-off tax info", then review completed returns with clients
  - 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. Participation adequate for proficiency and value-added/contribution to the program is expected.
- Added benefit: you may prepare your own/family/friends' tax returns.

2019 will be first year Sublette County VITA will be involving the Sublette County Library and local volunteers for tax prep. We still have many details to work-out, and hope that volunteers will be able to participate in planning details of the program, to fit their needs. VITA has been providing tax help at Rendezvous Pointe Senior Center for several years. The VITA team from Jackson will support, provide training, and be on-site as required to help this succeed.

*Still interested? Then continue to next page for details.*

***MORE QUESTIONS? NEED TO TALK? You are welcome to contact **Grace M. Robertson,** site-coordinator, at [gmrobertson@bresnan.net](mailto: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 provided documentation also supports study. *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: These sessions will *teach our site processes, focus on more complex materials, and provide total program perspectives.* Additionally, training will include computer practice with tax software to develop tax returns.
- 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, take at home.
  - 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, first week in February.
  - 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 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 where 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.

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