



Free Community Tax Service (FCTS) 2023-2024 Volunteer Job Description

About the Free Community Tax Service

United Way of Monroe County is seeking volunteers for local tax prep sites for the upcoming tax season. The Free Community Tax Service provides FREE federal and state income tax preparation to low- and moderate-income residents from January to April each year. Volunteers will screen clients in an intake and interview process, prepare tax returns, and peer review returns for quality assurance. **No prior experience necessary!** Volunteers will receive training in income tax law and tax preparation and become IRS- certified. Each tax site is a **collaborative team environment**, with everyone working together to ensure we prepare accurate returns and deliver high-quality service.

Benefits

- Get valuable knowledge about taxes and tax preparation.
- Enhance your resume with real-world experience preparing tax returns and serving clients in a professional environment.
- Work collaboratively with a team to impact people's lives in a measurable way
- Achieve Continuing Education credits for Certified Professional Accountants
- Free & convenient parking available at most tax site locations!
- Free Community Tax Service T-Shirt (Hoodie for returning volunteers!)

Skills and Qualifications

- Comfortable with technology- online software use, accurate typing
- Problem-solving skills
- Ability to work independently and work well with diverse populations.
- Strong communication skills including English fluency and the ability to translate tax law into understandable concepts for clients and other volunteers.

Bilingual volunteers needed!

Requirements

- Complete all IRS training and certification requirements related to the volunteer position you hold and the site where you are assigned.
- Maintain communication with the Site Coordinator regarding tax prep and scheduling.
- Be on-site fifteen minutes prior to site opening and stay until the site is ready to close.



To become a Tax Hero today, visit:
www.monroeunitedway.org/TaxHero
and complete the online application.

Questions? Email VITA Coordinator: amy@monroeunitedway.org

Timeline and Time Commitment

Training and certification will occur in December- January. The amount of time required to get certified varies quite a bit, depending on your learning style and familiarity with the material. Training opportunities will be a mix of virtual and in-person events, based on volunteer preference. During tax season, volunteers are encouraged to work one tax shift per week (about 3-4hrs) at the same tax site for the duration of the tax season, beginning the first week of February and continuing through mid- April. Certification must be completed by January 30, 2023.

Work Environment

Tax Volunteers will work indoors in an office environment at the FCTS tax sites, located at organizations throughout Monroe, Owen, and Brown counties.

Available Positions- (Listed in order of increasing responsibility)

Intake Specialist: ★☆☆☆☆

Intake Specialists will welcome taxpayers to the site, ensure they have the required documentation for their tax appointment, and assist them in filling out the intake and interview form. Intake Specialists will work with the Site Coordinator to assign the taxpayer to the next available and appropriately qualified Tax Preparer.

Certified Tax Preparer: ★★☆☆☆

Certified Tax Preparers will sit one on one with taxpayers, use their tax forms along with the intake & interview forms and complete tax returns on the IRS provided software (returns are typically simple 1040 or 1040EZ). The position involves using computer equipment and software, professional interactions with taxpayers, other volunteers, and key partners, applying high ethical standards, and adhering to Internal Revenue Service policies, procedures, and guidelines.

Lead Tax Preparer: ★★★☆☆ *Requires previous Certified Tax Preparer experience*

Lead Preparers are responsible for preparing tax returns, training other Certified Tax Preparers on proper site protocol, conducting quality reviews, and assisting the Site Coordinator with other duties related to the smooth operation of the tax site. This is considered a leadership position and will only be offered to Certified Tax Preparers that have shown initiative and responsibility in previous years.

Site Coordinator: ★★★★★ *Requires previous Certified Tax Preparer experience*

Site Coordinators are responsible for overseeing all site operations and managing other tax volunteers to ensure tax sites run efficiently. Site Coordinators review all returns prepared and submit them to the IRS, following up to make sure all returns are accepted and resolving rejected returns. Site Coordinators must stay in contact with the VITA Coordinator before, during, and after tax season.

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