



Hispanic Unity of Florida Job Description

Job Title: Quality Reviewer
Department: Economic Development
Reports To: VITA Program Manager
Classification: Non-Exempt, Seasonal
Work Location: In- Office
Date Released: _____

CHANGE LIVES AND MAKE A DIFFERENCE!

At Hispanic Unity of Florida (HUF), we change lives every single day – in small and big ways. If you want to join an exceptional organization that works tirelessly to ensure that everyone is empowered to live their American dream, please continue reading.

It is imperative that all applicants share HUF's values as it serves as the foundation for how we treat each other, our clients, our funders, and everyone we come into contact with. Those values include, but are not limited to: *Integrity, transparency, respect, dignity, accountability, diversity, and cultural awareness, commitment to excellence, collaboration and teamwork.*

Job Summary:

The Quality Reviewer (QR) is essential to ensuring return accuracy and quality tax preparation services. The QR works to ensure the overall accuracy rate of their designated VITA site. Paramount to this effort is that the program assists clients in identifying and accessing all eligible tax credits to maximize the refunds brought back to the community.

Responsibilities:

- The goal of the 2024 VITA program is to have 4,500 error free returns electronically filed and accepted with a 9% rejection rate for all e-filed returns.
- The QR plays an active role in identifying and recording the most common errors made by the VITA tax preparers.
- The QR is also responsible for safeguarding that the privacy and confidentiality of client information throughout the return preparation process.
- The QR facilitates the provision of an excellent, customer focused, efficient and cost-effective tax preparation service.

Essential Duties:

- Ensure that the VITA site is set up and closed down at the end of each service day.
- Examine every return prepared at the VITA site by completing Section C of the IRS Form 13614-C and conversing with the taxpayer during this process.
- Review returns line by line with the client to answer any questions or concerns (via conference call when it applies to the Virtual VITA services).
- Note errors and issues that arise in the completion of quality reviews and report findings to the SC to improve return accuracy.
- Provide clients direction on completing client satisfaction surveys at the end of the quality review process.
- Answer tax related questions or concerns the clients may have.
- Inform taxpayers of their responsibility for the information provided for tax preparation and quality review before asking the taxpayer to sign Form 8879 or the 1040 signature page for Paper returns.
- Assist the SC with team meetings to discuss quality review findings and provide mentorship support and resources to volunteers.
- All other duties as assigned.

Qualifications and Job Requirements:

- **All candidates must pass with a level 2 background check.**
- The TP/QR must attend new and/or refresher tax law trainings, including the use of the TaxSlayer® return prep/ filing software, and pass all certification exams required by the IRS (e.g. Standards of Conduct, Intake/Interview & Quality Review, Advanced, and Site Coordinator) prior to the start of the tax season.
- The QR must attend all mandatory staff training and staff meetings (whether in person and virtual).
- The QR will assist the SC with the preparation of periodic reports required by funders and program management.
- The candidate must be fluent in English (written and spoken) and possess strong communication, organizational and problem-solving skills, attention to details, and have the ability to prioritize multiple tasks.
- Bilingual skills are a plus (English/Spanish, English/ Creole, English/Portuguese).
- This position is also responsible for handling various administrative duties as required by the department.
- Demonstrated ability to work effectively with diverse customers from diverse communities.
- Ability to work effectively in a team environment, positive attitude and handles sensitive and confidential information with maximum discretion.
- Be available to work flexible hours, to meet the program expectations. (Some weekends and evenings)
- Proficiency in Word, Excel, Outlook and PowerPoint.
- Ability to travel independently and possesses a valid Florida driver's license and insurance. (Proof Required).

Education and Experience:

- The ideal candidate will have an associate degree and/or at least 2 years of tax/VITA related experience; comparable experience.

Working Environment:

- A workspace will be provided/assigned for the individual to perform the duties in a confidential setting. The QR must exercise precautions to ensure the safe and secure handling of clients' information.

Physical Requirements:

- Prolonged periods sitting at a desk and working on a computer.
- Must be able to lift up to 15 pounds at times.

Hispanic Unity of Florida is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the employer will provide reasonable accommodations to qualified individuals with disabilities and encourage both prospective and current employees to discuss potential accommodations with the employer.

I have read my job description and understand my responsibilities.

Employees Signature _____ Date: _____

Supervisor's Signature _____ Date: _____

Title: _____

This job description does not alter your “at-will” status. It is not an employee agreement or contract. Management has the right to alter this job description at any time with or without notice. Employee understands that other tasks or duties may be added or assigned from time to time, at the discretion of the administration.