



Hispanic Unity of Florida Job Description

Job Title	:	VITA Tax Preparer
Reports To	:	VITA Site Coordinator
Classification	:	Non Exempt – Part Time position (Schedules may vary- January 2018 through April 2018)
Salary	:	\$12 per hour
Date Released	:	November 2017

Program Summary:

The goal of Hispanic Unity's VITA program is to provide a top quality, 100% free tax preparation service for low to moderate income families throughout Broward County. 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.

Program Goal:

The goal of the 2018 VITA program is to have 6,000 error free returns electronically filed and accepted by the IRS. VITA sites must maintain a rejection rate of less than 9% to ensure quality.

Tax Preparer Performance Accountability:

The Tax Preparer (TP) is responsible for income tax preparation at the VITA Sites. The performance accountability standards for this position require that the TP works to identify potential tax credits and liabilities and ensures accurate and complete returns are filed in a timely manner. The TP plays an active role in completing tax forms in accordance with policies and in compliance with IRS regulations. This position is also primarily responsible for ensuring that the privacy and confidentiality of client information is always maintained and safeguarded during the entire return preparation process.

Performance Measures:

- Interview the tax payers by utilizing the Intake and Interview sheet IRS Form 13614-C
- Prepare or assist in preparing basic to advanced tax returns for individuals and families at the VITA Sites
- Maximize taxpayer deductions and credits such as the Earned Income Credit and Child Tax Credit
- Advise tax payers of potential tax liabilities
- Consult IRS tax law publications 4012 and 17 for special cases and difficult tax returns
- Ensure due diligence by advising the taxpayer that he/she is ultimately responsible for the information on the return
- Ensure the provision of an excellent, customer focused, cost effective tax preparation service where the majority of requests are dealt with at the first point of contact
- All other duties as requested by VITA program management



Skills:

- Strong communication skills.
- Pride in performing tasks completely and accurately
- Precise and clear communication skills, ability to deal with volunteers, stakeholders, partners, and the public in a helpful and supportive manner to resolve all situations

Miscellaneous:

Be available to work evening and weekend hours depending on the site schedule.

Qualifications:

The ideal candidate will have an Associate’s degree and/or at least 2 years of tax/VITA related experience; equivalent combination. Attend and successfully pass any new and/or refresher tax law training and all IRS certifications required (Advanced level) including the use of the TaxSlayer® electronic filing software. Also required for the position is the Form 13614-C Intake/Interview and Quality Reviewer training, Cancellation of Debt and Health Savings Account certifications. Excellent communication skills are a must; bilingual a plus (English/Spanish, English/Creole, English/Portuguese).

Must have a valid driver’s license and appropriate insurance or be able to secure a valid Florida driver’s license/insurance at the time of employment for this position.

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 encourages both prospective and current employees to discuss potential accommodations with the employer.

I have read my job description and clearly understand my responsibilities as Tax Preparer.

Hispanic Unity of Florida, Inc.

Employee Signature_____ Date: _____

Employee Print Name_____

VITA Program Manager

Signature_____ Date: _____

“This job description is not an employment agreement or contract. Management reserves the right to amend this job description at any given time without prior notice”.

Updated: November 2017