



Hispanic Unity of Florida Job Description

Job Title: VITA Tax Preparer/Greeter
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 goal of Hispanic Unity's VITA program is to provide a top quality, 100% free tax preparation service for low to moderate income residents 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. The Tax Preparer/Greeter (TP/GR) represents the first impression of the VITA program to the public. Their role is to welcome the VITA clients and set the standard for excellent customer service at the site.

Responsibilities:

- The goal of the 2027 VITA program is to have over 4,000 error free returns electronically filed and accepted with a maximum 9% rejection rate for all e-filed returns.
- The TP/GR is also responsible for safeguarding the privacy and confidentiality of client information throughout the return preparation process.
- The TP/GR facilitates the provision of an excellent, customer focused, efficient and cost-effective tax preparation service.

Essential Duties:

- Assist with daily VITA site set up and breakdown (where applicable).
- Review all taxpayer documents to ensure preparedness before starting the return preparation process.
- Distribute demographic and satisfaction surveys with instructions to all taxpayers.
- Interview taxpayers by using IRS Form 13614-C 100% of the time and confirm taxpayer's scenario is within scope of the VITA program.
- Regularly use IRS publications 4012 and 17 throughout the intake/interview and tax preparation process.
- Review all Quality Tax Alerts and Quality Site Requirement Alerts distributed at all VITA sites per Site Coordinator's instructions.
- Answer all taxpayers' questions throughout the tax preparation process.
- Collect 100% of demographic surveys, ensure completion, and deposit all surveys in designated drop boxes or folders at each site.
- Inform taxpayers of refunds and options to receive refunds or tax liabilities, payment deadline and payment options.
- Alert Site Coordinator of taxpayer's request for special accommodations.
- Perform all other duties as assigned.

Qualifications and Job Requirements:

- **All candidates must pass a level 2 background check and complete a affidavit of good moral character.**
- The candidate must attend new and/or refresher tax law trainings, including the use of the TaxSlayer® electronic filing software, and pass all certification exams required by the IRS (e.g. Standards of Conduct, Intake/Interview & Quality Review, and Advanced) prior to starting the first shift.
- The candidate must attend all mandatory staff training and staff meetings (whether in person or virtual).
- This candidate is also responsible for handling various administrative duties as required by staff.
- The candidate demonstrates the ability to work effectively with diverse customers from diverse communities.
- The candidate demonstrates an ability to work effectively in a team environment, maintain a positive attitude and handle sensitive and confidential information with maximum discretion.
- The candidate is able to work flexible hours (including weekend and evenings) to meet the program expectations.
- Proficiency in Word, Excel, Outlook and PowerPoint.
- Bilingual skills are a plus (English/Spanish, English/Creole, English/Portuguese).
- The candidate is able to travel independently and possesses a valid Florida driver's license and current insurance. (Proof Required).

Education and Experience:

- The ideal candidate will have at least a high school diploma or GED and/or at least 2 years of tax/VITA related experience; equivalent combination.

Working Environment:

- A workspace will be provided/assigned for the individual to perform the duties in a confidential setting. The VITA TP/G 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.