



Virtual Tax Preparer Description

CA\$H Coalition/VITA Overview:

The Onondaga County CA\$H Coalition helps low-to-moderate income individuals and families increase financial stability and empowerment. We promote the Earned Income Tax Credit and other valuable tax benefits, provide free tax filing services and offer financial education and coaching through Coalition members to empower people in our community to better understand their options when it comes to spending, saving, and borrowing. Our goal is to help families build assets, use credit wisely and ultimately achieve financial security.

In order to provide free tax preparation through our Volunteer Income Tax Assistance program, a service that brought over \$6 million back to our community through refunds last year, we rely on community members like you to volunteer by establishing and organizing sites, assisting taxpayers with paperwork, preparing taxes, and reviewing returns for quality and accuracy.

Volunteer Position Overview:

The VITA Tax Preparer is responsible for providing tax preparation services to taxpayers. The tax preparer ensures the taxpayer's returns are within scope of the VITA program and works to provide high-quality tax return preparation. The tax preparer also works closely with the greeter/intake specialist to ensure taxpayers are assigned to them correctly based on the certification levels needed to prepare the tax returns. All tax preparers are required to certify in tax law. The tax preparer position is a volunteer temporary position from approximately January through April. While tax preparers usually volunteer at a tax site on an in-person basis, this year most returns will be done virtually, and tax preparers will be able to prepare returns and volunteer from their own homes!

Essential Duties:

- Adhere to the VITA/TCE Volunteer Standards of Conduct and Quality Site Requirements
- Pass the online IRS certification(s) at least at the Basic level; advanced/military/international may be preferred by certain sites
- Ensure Intake/Interview & Quality Review Sheet is properly completed based on information the taxpayer provides; ask follow-up questions to clarify any unclear circumstances when necessary
- Confirm all reportable income is included on the taxpayer's return(s) and all allowable/eligible deductions and credits are claimed for the taxpayer
- Prepare accurate federal and state tax returns for qualified taxpayers based on information provided by the taxpayers
- Ensure all tax returns completed by the tax preparer are Quality Reviewed by the assigned peer, Quality Reviewer or Site Coordinator
- Prepare only tax returns within the scope of training and certification level
- Answer basic tax-related questions and refer taxpayers who have complex (out of VITA's scope) tax returns to the appropriate resources such as IRS
- Adhere to the IRS Privacy and Confidentiality guidelines.
- Communicate readily with Site Coordinator regarding scheduling concerns, taxpayer challenges, etc.

For more information contact Meredith Ouderkirk at (315) 428-2220 or mouderkirk@unitedway-cny.org