

# JOB DESCRIPTION



Job Title:	<b>Tax Preparation Site Coordinator</b>	Status: (E/NE)	<b>Volunteer-Homestead Only Site</b>
Department/Program:	MABC/VITA	Reports to:	Policy & Research Manager
Location:	United Way Johnson Control Volunteer Center-200 W Pleasant St	Travel Required:	Yes
Grade:		Position Type:	Seasonal
Management: (Yes/No)	Yes	HR Contact:	

**Job Purpose:** Coordinators must certify to the Advanced Level in IRS certifications. Oversee the tax preparation process at assigned site. Provide supervision to Quality Reviewers, Tax Preparers, Client Intake Specialists, and volunteers. Train staff and volunteers in how to prepare and perform quality review of tax returns. With the assistance of the program manager, creates and manages a schedule for their site. Assist with difficult tax returns and the ability to assist in all positions in the tax preparation process. Verifies and transmits electronic tax returns daily to ensure compliance. Develops and maintains a strong relationship with WI Department of Revenue to stay abreast on the State tax laws. Provide coordination, organization and supervision for all aspects of the tax site operations for the Volunteer Income Tax Assistance (VITA) Program by performing the following duties:

**Essential Duties include the following. Other duties may be assigned.**

1. Maintain relationships with VITA Program Assistant for obtaining site materials and other pertinent information. Ensure that adequate supplies and equipment is maintained at the site. Act as a liaison to ensure needs are successfully addressed.
2. Develop and maintain schedules for volunteers and employees to work at the site and ensure adequate tax preparation and quality review coverage. Provide technical assistance to volunteers and mentor them on tax issues, as necessary.
3. Train staff and volunteers on how to prepare and perform quality review of tax returns.
4. Publicize sites and promotional activities throughout the community. Ensure free services are provided to all taxpayers.
5. Monitor site(s) to ensure that an intake process includes the use of an intake sheet for every return, a quality review is being conducted, privacy is being maintained and each return is identified with the site’s identification number.
6. Supervise staff and volunteers of the site.
7. Electronically file all returns.
8. Ensure that taxpayer’s information is entered into the preparer’s use fields on each return. Resolve any tax return issues that “reject” during the transmission process.
9. Ensure that the screening, waiting, assistance and quality review steps of the VITA process flow seamlessly.
10. Upon acceptance of the return by Wisconsin Department of Revenue, ensure that all required supporting documentation to complete the claim is grouped by taxpayer and placed in an addressed envelope and make ready for pick up by SDC Operations team member.
11. Ensure that clients are aware of their opportunity to participate in other services being provided at the site.

**Skills/qualifications:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Possess the ability to effectively present information and respond to questions from managers, clients, customers, and the general public. Possess

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strong verbal and written skills. Good organizational and leadership/management skills, basic tax knowledge, computer (Windows) literate and assist with training as needed. Must attend and successfully pass the tax law e-filing training session and obtain the advanced certification through Link & Learn Taxes. Must have accurate data entry skills and a strong understanding of tax regulations. After training, must have a working knowledge and understanding of current tax laws and credits that can impact taxpayers demonstrated by passing the tax preparation test in order to retain employment in this position. . Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Experience/Education/Training/Certifications:** High school diploma or equivalent and three years of tax preparation experience, including working in a volunteer return preparation program plus two years of related experience including interviewing for the purpose of gathering and verifying pertinent information for the completion of forms; securing financial information; performing basic mathematical computations; interpreting rules and regulations and reviewing forms or documents for completeness and accuracy; or equivalent combination of education and experience. Experience with entering and retrieving information from computer software. Prior tax experience is needed, accounting and financial experience useful.

### Physical Demands:

- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The phrases “occasionally,” “regularly,” and “frequently” correspond to the following definitions: “Occasionally” means up to 1/3 of working time, “regularly” means between 1/3 and 2/3 of working time, and “frequently” means 2/3 and more working time.
- While performing the duties and responsibilities of this position, the employee is occasionally required to stand and walk. The incumbent will regularly sit, and will frequently talk and listen and use hands to finger, handle or touch. Specific vision requirements for this position include close vision and the ability to adjust focus. During the performance of his/her duties, the incumbent will regularly lift up to 25 pounds and occasionally up to 50 pounds.

### Work Environment:

- The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- The employee works regularly in an office environment where the noise level is moderate.
- May work some evenings or Saturday hours.

### Disclaimer:

The above statements are intended to describe the general nature and level of work being performed by volunteers for this position. They are not be construed as an exhaustive list of all responsibilities, duties, and skills required. **All volunteers are required to complete and submit with volunteer interest form a completed Background Information Disclosure form.**