

JOB DESCRIPTION

Job Title:	Tax Preparer	Status: (E/NE)	Volunteer-Homestead Only Site
Department/Program:	MABC/VITA	Reports to:	Site Coordinators
Location:	United Way Johnson Control Volunteer Center-200 W Pleasant St	Travel Required:	Yes
Grade:		Position Type:	Seasonal
Management: (Yes/No)	No	HR Contact:	

Job Purpose: Provide Homestead Tax assistance. The Tax Preparer will provide quality tax return assistance to taxpayers. Probe for all valid tax information needed to claim credit. Work with Site Coordinator and other team members to ensure that clients receive the best customer service we can deliver. The Tax Preparer will provide support to the VITA Program by performing the following duties:

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

1. Punctuality and overall consistent, excellent attendance is a must.
2. Provide high-quality tax assistance to all taxpayers.
3. Prepare multiple year tax returns via TaxSlayer based on taxpayer’s documentation.
4. Ensure that all taxpayers complete a Milwaukee Asset Building Coalition’s Client Intake Sheet. Interview clients to determine if taxpayer has a Federal & State Filing requirement or if it would be beneficial for them to file a full tax return. If so refer to one of the full-service sites.
5. Maintain confidentiality of client information.
6. Ensure on-site quality review is performed on all completed returns.
7. Ensure a copy of the completed return is provided to the taxpayer.
8. Ensure no compensation of any kind is accepted for the services provided.
9. Adhere to Title VI by not denying service to anyone based on race, color, sex, age, national origin or disability.
10. Report any problems that arise to the Site Coordinator.
11. Refer taxpayers to other services being offered at the tax site

Skills/qualifications: The requirements listed below are representative of the knowledge, skill, and/or ability required. Must attend SDC’s free tax law-e-file training session and pass the basic level certification of IRS Link & Learn Taxes. Tax Preparers will need to pass a criminal background checks and drug test in order to be approved to work within the program. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Experience/Education/Training/Certifications: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The tax-preparer must have at least a high school diploma but higher education in accounting or business math is preferred. The candidate must pay close attention to detail. Attend a tax law-e-file training session and pass the advanced level certification of IRS Link & Learn Taxes. Tax Preparers should have some experience with basic computer skills as preparation involves the use of software. Excellent interpersonal skills are critical. It is recommended that the

JOB DESCRIPTION



candidate has some previous work experience working with the area of customer service. Demonstrate the ability to effectively present information and respond to questions from managers, clients, customers, and the general public. Strong written and oral communication skills are required. Must be accurate in data entry skills and have an 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.

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 staff assigned to this position. They are not be construed as an exhaustive list of all responsibilities, duties, and skills required. **All personnel may be required to perform duties outside of their normal responsibilities from time to time, as needed. All volunteers are required to complete and submit with volunteer interest form a completed Background Information Disclosure form.**