

VITA Site Job Descriptions Berrien/Cass/Van Buren Counties

Site Coordinator – maintains and runs a quality site

Pre-season

- Order site supplies from IRS and State (list attached)
- Stock volunteer supply tubs (suggested item list attached)
- Make meal schedule for training and filing dates; contact restaurants for discounts
- Walk through selected site(s) to make sure there are enough chairs and workstations
- Make a site flow plan (client entry/exit, reception/waiting area, volunteer break area, separate office area)
- Work with site to determine service hours, set-up/take-down requirements
- Make client intake sheets (include IRS-required info) and preparer log sheets (see attached examples)
- Work with IT support to input basic default information for all returns on computers

Filing Season

- Responsible for set-up/take-down on filing days
- Work with Reception and Client Intake to manage flow and client/tax preparer match-ups
- Track filer contact info, key data and status (see attached example)
- Order food for filing days (get # from volunteer recruiter). Expect to spend \$6-8/person
- Maintain adequate supplies, forms and research materials
- Keep copies of incomplete returns by workstation # for easy reference when client returns (unless all computers linked to a server, enabling files to be accessed on any computer)
- Establish secure, locked facility for file storage with quick access during filing times
- Work closely with Tax Specialists and Quality Control to maintain a quality site
- After February 28th, be sure that prior year and amended forms are available (paper or online)
- Maintain confidentiality of client information

Post-Season

- Provide all client data and TaxWise disks to the IRS for safe keeping
- Work with IT Coordinator to make sure client information is removed from site computers
- Create site report that includes totals for all required data (i.e AGI and EITC)

E-File – transmits completed returns to the IRS and State

- Check completed returns against preparer log sheets
- Download appropriate files from server (or individual computers) for transmittal to the State and IRS
- Check DCN report before transmitting
- Download acknowledgments from the State and IRS 1-2 days after transmission and check against returns
- Accepted Returns – remove the signed 8453s and send to the IRS; a copy is kept on file until season end
- Rejected Returns – review the reject code and determine method for correction (client may need to return)
- Once corrections are made, resend corrected returns to the IRS
- Keep site copies of returns in envelopes labeled with date and last names for easy reference
- Maintain confidentiality of client information

Volunteer Coordinator – recruits volunteers and coordinates training and filing schedules

Pre-Season

- Work with Volunteer Center to write ad copy
- Send letters in the fall to current/potential volunteers to determine interest/update contact info
- Arrange for a pre-season open house to announce program details and hand out manuals
- Work with trainer(s) to establish training dates and schedule volunteers for training
- Try to get volunteers to commit to filing dates before the season starts
- Order food for training dates
- Assign volunteers to specific positions (see below)
- Responsible for providing copies of volunteer certifications/agreements to site coordinator

Filing Season

- Provide volunteer sign-in sheet
- Maintain spreadsheet of volunteer contact info and hours worked
- Make weekly reminder calls to make sure filing sites are adequately staffed

Post-Season

- Distribute and tabulate volunteer survey along with thank-you letter
- Plan celebration dinner
- Provide volunteer names to IRS for recognition certificates

Tax Instructor – provides pre-season volunteer tax instruction

- Should have several years' experience in Tax Law, specializing in low-income tax issues.
- Tax law instruction is based upon IRS and State training materials
- computer training utilizes IRS-provided software

Tax Specialist

Pre-Season

- All Tax Specialists must pass an IRS certification exam in order to prepare tax returns
- Training options include: classroom, IRS online site or self-study manual.

Filing Season

- Answer questions (both tax law and computer input questions) as tax returns are being prepared
- Maintain confidentiality of client information

IT Coordinator/Technical Support

Pre-season

- Set up site computers (assist in finding borrowed or donated computers, if necessary)
- Install software and updates
- Network computers as necessary
- Install firewalls or other security measures
- Make sure an Internet connection is available

Filing Season

- Be on site for the first few filing dates in case volunteers experience computer troubles
- Once traffic slows, IT support can be provided on an on-call basis

Post-season

- Responsible for removing all taxpayer files from computers used during tax season
- Burn two final disks with all taxpayer files
 - o one for the IRS with all taxpayer files
 - o one backup copy for the Site Coordinator or EFIN registrant

Receptionist – official greeter and “traffic cop”

- Should be familiar with tax filing process (does not need to attend training)
- Make sure all clients sign in and are given a number
- Work w/Site Coordinator to determine a “cut-off” number
- Refer clients who arrive after the cut-off to other filing dates/locations
- Make sure clients and preparers are matched up in the correct order
- Answer phones (if the site has one)
- Provide educational handouts to clients who are waiting
- Serve as “cheerleader” to keep spirits up when the wait is long
- Maintain confidentiality of client information

Client Intake/Out-take – client interviewer

- Tax law training desirable but not required
- Meet individually with clients before they meet with a tax preparer
- Screen clients for eligibility
- Make sure clients have all necessary paperwork
- Help clients fill out IRS-mandated forms (intake sheet, privacy agreement).
- Sign out each client, obtain survey answers (if using) and hand out free gift (if provided)
- Maintain confidentiality of client information

Tax Preparer

Pre-Season

- All Tax Preparers must pass an IRS certification exam in order to prepare tax returns
- Training options include: classroom, IRS online site or self-study manual.

Filing Season

- Review the Client Intake Sheet with client before entering data into the computer
- Ask appropriate questions to make sure all income, deductions and allowable credits are claimed
- Maintain confidentiality of client information
- Refer questions/concerns (in private) to the Tax Specialist or Site Coordinator
- Prepare a complete tax return, including Federal and State as appropriate
- Run computer diagnostic on return before printing and having return checked
- Give client a complete copy of their return; make sure all site copies are signed

Quality Control

Pre-Season

- All Tax Preparers must pass an IRS certification exam in order to prepare tax returns
- Training options include: classroom, IRS online site or self-study manual.

Filing Season

- Ideal for knowledgeable volunteers who prefer not to have a lot of client contact.
- Review completed tax returns for math errors and miskeyed information
- Make sure all necessary documents are signed in the right place
- Determine that preparers asked the right questions and correctly filled out all appropriate forms
- Provide feedback on preparer errors to Site Coordinator and/or Tax Specialist
- Maintain confidentiality of client information

Interpreter

- Assist clients who don't speak English
- Prefer some tax background or training so technical questions can be answered without key information being “lost in translation”

Outreach

- Assist Coalition marketing efforts
- Distribute flyers to area businesses
- Fulfill hotline requests
- Help with public relations efforts

Recommended Supply Lists

Computer Supplies

- Toner (copier and printer)
- Paper
- Disks
- Battery backup (for laptops)

Volunteer Supplies

- Pencils/pens
- Scratch pads
- Stapler/staples
- Calculators
- Paper clips
- Envelopes/labels
- File folders
- "Cheat sheets"
- Log sheets
- Zip-loc baggies
- Clipboards
- Name tags

Tax Forms and Publications

- Instructor Guides (Pub. #1155)
- Textbooks (Pubs. #678 and #17)
- 1040 Instructions
- Volunteer e-file Handbook (Pub. #3189)
- IRS Business Reply Labels – Andover
- Important Tax Records Envelopes (#730)
- Client Intake Sheets (#13614)
- Volunteer Standards of Conduct Forms (#13615)
- Posters in English and Spanish