



## City of Phoenix

### VITA Tax Preparer Job Description and Responsibilities

The City of Phoenix VITA Tax Preparer is responsible for providing tax preparation services to eligible VITA program taxpayers. The tax preparer ensures the assigned returns are within scope of the VITA program and works closely with the site coordinator to provide high-quality tax return preparation for all taxpayers. The tax preparer also works closely with the greeter(s) / screener(s) 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 attend a classroom or online tax law training. The tax preparer position is a volunteer temporary position from approximately January through April.

#### Tax Preparer Job Description:

- Adheres to the VITA/TCE Volunteer Standards of Conduct- Ethics Training, Publication 4961, IRS Quality Site Requirements, and the City of Phoenix VITA Program Policy and Procedures manual.
- Required to pass the online IRS certification(s) at least at the Basic level. However, advanced level is recommended. Additional certifications such as Military, HSA, and International are optional.
- Ensures the taxpayer's Intake/Interview & Quality Review Sheet is properly completed based on information the taxpayer provides and asks follow-up questions to clarify any unclear circumstances when necessary.
- Ensures all reportable income is included on the taxpayer's return(s) and all allowable/eligible deductions and credits are claimed for the taxpayer.
- Prepares accurate federal and state tax returns for qualified taxpayers based on information provided by the taxpayers.
- Ensures all tax returns completed by the tax preparer are Quality Reviewed by the assigned Quality Reviewer or Site Coordinator.
- Prepares only tax returns within the scope of training and certification level(s). *A preparer should not prepare a tax return that is out of the scope of his or her certification level(s). If a preparer prepares an out of scope return and makes a mistake on it, then the preparer would be responsible for his or her own mistake.*
- Answers basic tax-related questions and refers taxpayers who have complex (out of VITA's scope) tax returns to the appropriate resources

such as AARP or Federal IRS or Arizona Internal Revenue Services (ADOR) for assistance.

- Adheres to the IRS Privacy and Confidentiality, IRS Publication 4299 guidelines.
- Reports to the Site Coordinator any unusual activity or suspected fraud.
- Communicates with the Site Coordinator if unable to volunteer for designated scheduled shift and complies with check in and out procedures at each site.
- Ensure due diligence by advising the taxpayer that he/she is ultimately responsible for the information on the tax return.