

Volunteer Income Tax Assistance Program

Volunteer Tax Preparer Job Description

Purpose:

Provide free basic tax return preparation for eligible taxpayers. To establish the greatest degree of public trust, volunteers have a responsibility to provide free high quality service and uphold the highest of ethical standards.

Responsibilities:

- Attend new and/or refresher tax law training and certification as needed, including the use of electronic filing software. Training may be completed on-line or in person.
- Successfully pass a test on required tax law knowledge.
- Provide high-quality assistance to all taxpayers. Directly prepare taxpayer's return based on information provided by taxpayer or answer tax related questions.
- Interact with taxpayers to determine the necessary information for completing a tax return.
- Prepare returns using electronic filing software.
- Refer customers with complex returns to the IRS website or to a tax practitioner.
- Maintain confidentiality of customer information.
- Ensure high-quality of returns by completing a quality review process on returns completed.

Skills & Knowledge Needed:

- Basic tax knowledge. Basic tax training and certification will be provided.
- Willingness to share time, skills and interests—volunteer a minimum of 3 hours per week for the volunteer tax program from approximately late-January to mid-April.
- Basic computer skills for inputting tax return information.
- Pride in performing tasks completely and accurately.
- Ability to deal with the public in a helpful and supportive manner, including interviewing skills. Interviewing skills training will be provided as needed.
- Friendly, dependable and flexible.

Time Commitment:

1 hour for orientation training in early December

2-8 hours of self-directed study for tax certification

4 hours for electronic filing software training

3-5 hours per week during filing season (late-January to mid-April)

Contact Person:

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