

Tax Site Tax Screener

Volunteer Job Description

DUTIES:

- Ensure taxpayers have the required documents (e.g., photo identification, Social Security card(s), W-2, 1099s, last year's return) for tax return completion
- Review the taxpayer's Form 13614-C *Intake/Interview & Quality Review Sheet* for completeness and accuracy
- Based on the documents provided by the taxpayer and the completed intake sheet, determine if the return is within scope of the VITA/TCC program
- Answer tax-related questions
- Meet "qualifications" and complete "required training" listed below

QUALIFICATIONS:

- Be an experienced, recurring volunteer tax preparer
- Have a previous VITA screening experience or have successfully completed the Tempe VITA Screener training
- Complete the FREE IRS Link and Learn online tax law course and become certified at the "Advanced" level
- Complete the IRS TaxSlayer software training provided
- Commit to volunteering a minimum of 20 hours during tax season
- Complete the IRS Standards of Conduct test
- Be a United States Citizen or in the United States legally

REQUIRED TRAINING:

Screener/Quality Reviewer Training

TaxSlayer software and Screener/Quality Reviewer training sessions will be held in the fall of 2021 or January 2022. The dates and times will be distributed to you after the Volunteer Application is completed.