

# Tax Site Quality Reviewer

## Volunteer Job Description

### DUTIES:

- Conduct a quality review on all returns – Form 13614-C must be used to perform the necessary quality review action items
- Before asking the taxpayer to sign Form 8879 or the return, advises the taxpayer that he/she is ultimately responsible for the information on the return
- Explain to the taxpayer that signing the return guarantees that the taxpayer has reexamined the return and its accompanying forms and schedules for accuracy, and they are signing the return under penalty and perjury
- Provide feedback to volunteer preparers explaining identified errors captured during quality review and instructions for making the necessary corrections
- Maintain confidentiality of taxpayer information
- Ensure no compensation of any kind is accepted for the volunteer services provided
- Meet “qualifications” and complete “required training” listed below

### QUALIFICATIONS:

- Be an experienced, returning volunteer tax preparer
- Have previous VITA quality review experience or have successfully completed the Tempe VITA Quality Review training
- Complete the free IRS Link and Learn online tax law course offered and become certified at the “Advanced” level
- For more complicated returns, be certified in Health Savings Account, Military and/or applicable certifications
- Complete and pass the IRS Taxwise software training
- Complete the IRS Standards of Conduct test
- Complete Screener/Quality Reviewer Training
- Commit to volunteering a minimum of 20 hours during tax season
- Be a United States Citizen or in the United States legally

**REQUIRED TRAINING:**

IRS Link and Learn Tax Law Course available online – must be completed prior to Screener/Quality Reviewer Training

Taxwise software training. A limited number of online classroom sessions will be offered in the fall of 2021 or January 2022. Volunteers will receive an email with the dates and times. The dates and times of the sessions will be sent after the Volunteer Application is completed.