Volunteer Tax Assistor (Preparer)

Location: Springfield Community Federation main office 52 Brandon Dr, Springfield IL 62703

Website: www.springfieldfederation.org

Reports to: The SCF Executive Director

Contact: Julius Simmons Jr. Ph: 217-679-0629 Email: jsimmons@springfieldfederation.org

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

Tasks:
• Successfully pass a test on required tax law knowledge.
• Provide high-quality assistance to all customers. Directly prepare customer’s return based on information provided by customer or answer tax related questions.
• Interview customer to determine if all income, deductions and allowable credits are claimed.
• Prepare only those tax returns for which training and certification were provided.
• Prepare tax returns using electronic filing software (whenever possible).
• Refer customers with complex returns to IRS website or help number, or to a tax practitioner or firm. However, volunteers should never refer customers to a specific practitioner or firm.
• Identify all returns with the Site identification Number assigned to your site.
• Ensure no compensation of any kind is accepted for the volunteer services provided.
• Maintain confidentiality of customer information.
• Ensure on-site quality review is performed on completed returns prior to being returned to customer.
• Ensure a copy of the completed return is provided to the customer.
• Adhere to Title VI by not denying service to anyone based on race, color, sex, age, national origin or disability.

Skills:
• Basic tax knowledge (Form 1040, Form 1040A and Form 1040EZ). Basic tax training and certification will be provided as requested.
• Willingness to share time, skills, and interests—e.g., volunteer a minimum of 2 to 4 hours per week for the Volunteer Tax program from approximately January through April 15. Training and program preparation begins in December.
• Basic computer skills for inputting tax return information.
• Pride in performing tasks completely and accurately.
• 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.