



Helping People. Changing Lives.

Tax Reviewer	Family Resources
Reports To	Approved Date

Overview:
All tax returns completed by TRI-cap volunteers go through a quality review process. Volunteer reviewers provide thorough on-site checks of all tax returns prepared by Tri-CAP volunteer tax preparers, thus ensuring that every customer receives top quality service.
Service Impact:
<ul style="list-style-type: none"> • Tri-CAP Volunteer Income Tax Program serves individuals grossing < \$35,000 and families < \$55,000 • Classroom and online training is provided to Volunteers who become IRS Certified to provide free preparation &/or quality review services at our tax sites. • Returns are efiled for quick receipt of refunds. • We offer free walk in preparation services from the end of January through tax day (mid April) at locations in St. Cloud, Cold Spring, Waite Park, and Elk River. • Appointments are scheduled at the Tri-CAP office May through August for federal, state, and property tax/renters rebates. • Referrals are also provided for basic needs services and financial education and financial stability opportunities.

Key Responsibilities:

- Review state and federal tax returns completed by volunteer tax preparers using tax software
- Correct any mistakes made by the preparer to ensure accuracy of all returns
- Compile completed return packet to be given back to customer
- Provide support and leadership to other volunteers, answering tax questions as needed
- Work cooperatively with staff and other volunteers to deliver high-quality service to customers

Time Commitment:

January – April

- Classroom training on Tax Law - federal and state, VITA Program information, etc.- January 15-18 hours
- Online software training 4 to 12 hours; using videos, practice lab, and completing certification exams.
- Review and Prepare tax returns – End of January-April, and May-August if interested at least once a week for four hours.



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Qualifications:

- Strong background in individual income tax required, with knowledge of low-income tax preferred
- At least two years or 80 hours experience preparing individual income tax returns
- High attention to detail
- Ability to provide feedback to other volunteers in a clear and supportive manner
- Experience with Volunteer Income Tax Assistance (VITA) preferred.
- Enjoy working in a diverse ethnic and socio-economic environment

Physical Demands:

- Combination of sitting and standing, mostly sitting.
- Ability to lift/carry containers of supplies, etc. up to 20 lbs.

Work Environment:

- Low to moderate noise levels.
- No extreme temperatures.

Locations: St. Cloud, Elk River, Cold Spring, Foley, and Waite Park

Benefits to Volunteering
<ul style="list-style-type: none"> • Gratifying volunteer work that allows you to develop new skills and gain valuable experience, working with diverse customers, volunteers and staff. • Improve your community by helping hardworking families increase their income, thus their livelihood. • Build your resume; an excellent opportunity for students and jobseekers to demonstrate experience to employers.

This description describes the general nature and work expected of an individual assigned to this position. All requirements are subject to possible modification to reasonably accommodate individuals with a disability

Volunteer Acknowledgement

Date

Supervisor Signature

Date