City of Phoenix

Volunteer Opportunities with VITA

No prior tax experience is required and **FREE** training is provided!

Site Coordinator

- Provide coordination, organization and supervision for a Volunteer Income Tax Assistance Program site
- Ensure that all volunteers adhere to the Volunteer Standards of Conduct and Quality Site Requirements
- Coordinate a schedule for volunteers
- Compile reports and volunteer hours on a monthly basis
- Complete site coordinator training
- Complete mandatory Volunteer Standard of Conduct Training
- **Complete tax law training, including the use of electronic filing software**

Tax Preparer

- Prepare basic 1040 tax returns and related schedules for eligible customers
- Interview taxpayer to determine if all income, deductions and allowable credits are claimed
- Prepare only those returns for which certification levels were completed
- Ensure a copy of the completed return is provided to the taxpayer
- Complete mandatory Volunteer Standard of Conduct Training
- **Complete tax law training, including the use of electronic filing software**

Greeter

- Greet and sign customers in
- Ensure the customer has brought all the necessary information
- Monitors site traffic to ensure all taxpayers checking in receive assistance
- Assist the tax preparers as needed
- Complete mandatory Volunteer Standard of Conduct Training

Instructor

- Instruct tax law classes and software classes
- Complete mandatory Volunteer Standard of Conduct Training
- Complete IRS Link & Learn tax law training, including advanced tax law certification. Also, use Link & Learn Practice lab to become familiar with the Taxwise software offered by the IRS
- Attend an Instructor Train-the –Trainer class offered by the IRS
- **Certified Public Accountant and Enrolled Agents can receive Continuous Professional Education (CPE) credits**

All volunteers will maintain confidentiality of customer information.
Volunteers are asked to serve a minimum of 25 hours during tax season.