

## **Volunteer Tax Assistor (Preparer)**

### **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 Mid-January through April 15.
- 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.

## 2007 Volunteer Student Guide What to Read

This is a suggested reading list for those taking the Basic Course

<b>Lesson</b>	<b>Pages</b>
Important Tax Law Changes for 2007	v to vii
Introduction & Administrative Guidelines	1 to 20
Lesson 1 Getting Started	1-1 to 1-29
Lesson 2 Filing Status & Filing Requirements	2-1 to 2-18
Lesson 3 Income	3-1 to 3-21
Lesson 4 Deductions & Tax Computations	4-1 to 4-4
Lesson 5 Earned Income Credit	Entire Chapter
Lesson 6 Child Tax Credit	Entire Chapter
Lesson 7 Credit for Child & Dependent Care Expenses	Entire Chapter
Lesson 8 Education Credit	Entire Chapter
Lesson 9 Miscellaneous Tax Credits	9-1 to 9-13
Lesson 14 Finishing the Return	14-1 to 14-34

You are encouraged to go on and read the remaining chapters and pages. You can then attempt the Intermediate & Advanced Course Material & Test. You do not have to read the "M-#-#" or "I-#-#" sections as you will not be preparing Military Personnel Returns or International Issues.

### Test

All students must take and pass the Basic Section with at least an 80 this year.

If you will be attempting the Intermediate you must take the Basic in addition. If you will be attempting the Advanced Section you must take the Basic & Intermediate Sections, in order to be certified for Advanced you must pass all sections with at least an 80. For further information see the Form 6744 Volunteer Assistor's Test.