



SAVEFIRST

SaveFirst Quality Reviewer

January-April 2023

Summary: This position offers an opportunity to provide an important alternative to the predatory tax preparation industry for low and moderate income families and help them obtain the credits they have earned. Quality Reviewers will utilize professional and personal skills interacting with clients and participating at community-based sites. Complete SaveFirst tax training sessions, obtain Advanced IRS VITA certification. Course/Internship credit through your respective department can be obtained as determined by your school upon satisfactory completion of required hours. If you are interested in this position, please submit your resume and statement of interest to Caroline Janeway, cjaneway@impactamerica.com.

Have a positive, direct impact on children, families, and communities.

- SaveFirst provides free tax preparation for over 13,000 families each year.
- Help low-income, working families secure over \$19 million in refunds and save nearly \$5.5 million in commercial preparation fees.
- Ensure that eligible families receive the Earned Income Tax Credit

Position Overview:

- **Earn \$15/hour**
- Complete approximately twelve hours of virtual tax training to learn both basic and advanced tax law concepts
- Gain IRS certification as an Advanced volunteer tax preparer
- Work 10- 30 hours/week between late January and mid March (or until mid April if possible)
- Assist families with high-quality tax preparation at community-based sites and/or from home through GetYourRefund virtual tax preparation as needed and approved by SaveFirst supervisor

Locations:

- Auburn, Birmingham, Florence, Huntsville, Montgomery, Tuscaloosa

Responsibilities:

- 1. Complete SaveFirst training course by January 17th:**
You will be required to attend the virtual SaveFirst trainings and pass IRS VITA Certification as an Advanced Volunteer. These trainings will include four hours of Basic Training, and eight hours of Advanced training. Training hours will be paid.
- 2. Pass the IRS Certification Test(s):**
You will be required to pass the Advanced IRS certification tests by January 17th. A score of 80% or higher is required to become certified. You will have the option to attend a virtual Testing Session. A staff member will be available to provide assistance to you as you complete your IRS certification test(s) if you choose to attend.
- 3. Regularly scheduled weekly hours at tax sites:**
During tax season, the time commitment consists of regularly scheduled weekly hours. There

will always be an Impact America team member available to assist you, and you will have contact information for several other resources should complicated issues arise.

In addition to preparing and reviewing returns, SaveFirst Quality Reviewers may assist with some of the following:

Site Management, including:

- Greeting taxpayers as they arrive
- Assisting in the maintenance of all taxpayer documentation
- Communicating with the Site Coordinators to ensure effective site operations

Tax Preparation Responsibilities, including:

- Quality review of tax returns
- Preparing returns when volunteers are not available

Answering volunteer questions, utilizing the following publications and/or resources:

- VITA hotline / IRS hotline
- Publication 17
- www.irs.gov
- Site Coordinator or other Impact America team members

Other responsibilities, including:

- Follow all Impact America COVID-19 Safety procedures

SaveFirst Quality Reviewers are expected to represent the program professionally; arrive on time and stay for the duration of scheduled shifts; maintain a positive attitude; treat all taxpayers, volunteers, Impact America staff, and community partners with respect; and report any problems to the SaveFirst Site Coordinators immediately.

For additional information email:

Caroline Janeway, Alabama State Director: cjaneway@impactamerica.com