

Newark Now's Volunteer Income Tax Assistance Program (VITA) Internship



Newark Now is seeking interns for the 2012 Tax Season, Mid-January through April 15th. Interns will be trained in income tax law, income tax preparation, quality review process and client relations. All interns will have to be certified through the IRS Link and Learn program. See Newark Now Tax Academy Syllabus for details of training program.

Interns will gain experience with income tax law and preparation. In addition, interns will gain valuable customer service experience. Most interns, those doing 150 or more hours, will serve as Assistant Site Coordinators and will go through site coordinator training.

About Newark Now's VITA Program

Newark Now's VITA Program VITA program helps the community by providing free tax preparation for low-income families and individuals. The Newark Now VITA program has been operating since 2004 (tax year 2003). In 2011, Newark Now prepared over 4,000 income tax returns. This resulted in over \$6.9 million in Federal and State Refunds. We estimate that we saved each tax filer over \$200 in tax preparation and filing fees. In 2011, Newark Now operated 6 VITA sites Monday through Saturday. Hours of operation included day-time sites (10:00 AM to 2:00 PM) and evening sites (3:00 PM to 8:00 PM).

Roles:

- Provide free income tax return preparation for eligible taxpayers. To establish the greatest degree of public trust, Interns have a responsibility to provide high quality service and uphold the highest of ethical standards.
- Provide on-site review of all tax returns completed by other VITA preparers at Newark Now VITA site. Ensure every customer visiting the site receives top quality service and that the tax returns are error-free.

Tasks:

- Attend basic, intermediate and advanced tax law training and certification as needed, including the use of electronic filing software.
- Successfully pass a test on required tax law knowledge. Obtain at least Intermediate certification through IRS' VITA Link and Learn training site. Obtain the Quality Review Certificate through www.EITCPlatform.org.
- 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 (TaxWise).
- Refer customers with complex returns to the IRS web site or help number, or to a tax practitioner or firm. However, VITA participants should never refer customers to a specific practitioner or firm.
- Ensure no compensation of any kind is accepted for VITA services provided.
- Maintain confidentiality of customer information.
- Ensure on-site quality review is performed on completed returns prior to being returned to customer.
- Follow the quality review process and procedures are followed at VITA site.
- Timely review all tax returns for accuracy before the returns are provided to the customer and/or are electronically filed.
- Provide feedback to VITA preparers regarding errors made on tax returns prepared at the site. 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:

- Tax knowledge (Form 1040, Sch A, Sch CEZ, Retirement Distributions, Education Credits, Retirement Contributions, Residential Energy Credits). Intermediate and Advanced tax training and certification will be provided as needed.
- Basic computer skills for inputting and conducting quality review of 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.

Training:

Training for the VITA internship is available through Newark Now's Tax Academy which is available during the fall. The Tax Academy will also be repeated during January, the schedules for the January classes are to be determined. See attached Tax Academy. Training completed during the fall will be counted towards the Spring semester internship.

Additional Information for Volunteers & Interns

The certification process is conducted online at [IRS' Link and Learn site](#). In addition we also have hard copies of the training publications. We will be offering training on a regular basis for our volunteers. This training will also include software training provided by Newark Now and also through the TaxWise training program. Newark Now will also be hosting training given by the Internal Revenue Service and State of New Jersey's Division of Taxation in the fall of 2011.

For more information or to volunteer/intern with Newark Now VITA please call 973-624-3733 or email Jeremy Guenter jguenter@newarknow.org.