



Hispanic Unity of Florida Job Description

Job Title	:	Quality Reviewer
Reports To	:	VITA Site Coordinator
Classification	:	Non Exempt – Part Time position (Schedules may vary-10 to 35 hours per week, January 2018 to April 2018. Some sites may stay open until September 2018)
Salary	:	\$13.39 per hour
Date Released	:	November 2017

Program Summary:

The goal of Hispanic Unity's VITA program is to provide a top quality, 100% free tax preparation service for low to moderate income families throughout Broward County. Paramount to this effort is that the program assists clients in identifying and accessing all eligible tax credits to maximize the refunds brought back to the community.

Program Goal:

The goal of the 2018 VITA program is to have 6,000 error free returns electronically filed and accepted by the IRS. VITA sites must maintain a rejection rate of less than 9% to ensure quality.

Quality Reviewer Performance Accountability:

The Quality Reviewer (QR) is essential to ensuring return accuracy and providing a quality tax preparation program. The performance accountability standards for this position require that the QR works to ensure the overall accuracy rate of their designated VITA site. The Quality Reviewer plays an active role in identifying and recording the most common errors made by the volunteers and reporting this information to the Site Coordinator (SC). This data assists both the QR & SC in providing the necessary coaching and resources to the volunteers in order to reduce rejection rates and to improve site performance. This position is also primarily responsible for ensuring that the privacy and confidentiality of client information is always maintained and safeguarded during the entire return preparation process.

Performance Measures:

- Examine every return prepared at the VITA site by completing Section C of the Intake and Interview sheet IRS Form 13614-C
- Review returns line by line with the client to answer any questions or concerns
- Make note of errors and issues that arise in the completion of returns and report findings to SC in order to improve accuracy rate and keep rejection rate down below 9%
- Collect all demographic and client satisfaction surveys from clients upon completion of the quality review process
- Advise the taxpayer that he/she is ultimately responsible for the information on the return before asking the taxpayer to sign Form 8879 or the return
- Support the SC and the Greeter with the setup and break down of the site
- Assist SC with site meetings to discuss quality review findings and provide mentorship support and resources to volunteers
- Ensure the provision of an excellent, customer focused, cost effective tax preparation service where the majority of requests are dealt with at the first point of contact
- All other duties as requested by program management



Skills:

- Strong organizational and leadership/management skills.
- Must be proficient in Microsoft Word and Excel,
- Pride in performing tasks completely and accurately
- Precise and clear communication skills, ability to deal with volunteers, stakeholders, partners, and the public in a helpful and supportive manner to resolve all situations

Miscellaneous:

Be available to work evening and weekend hours depending on the site schedule.

Qualifications:

The ideal candidate will have an Associate's degree and/or at least 3 years of tax/VITA related experience; equivalent combination. Attend and successfully pass any new and/or refresher tax law training and all IRS certifications required (Advanced level) including the use of the TaxSlayer® electronic filing software. Also required for the position is the Form 13614-C Intake/Interview and Quality Reviewer training, Cancellation of Debt and Health Savings Account certifications. Excellent communication skills are a must; bilingual a plus (English/Spanish, English/Creole, English/Portuguese).

Must have a valid driver's license and appropriate insurance or be able to secure a valid Florida driver's license/insurance at the time of employment for this position.

Hispanic Unity of Florida is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the employer will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.

I have read my job description and clearly understand my responsibilities as Quality Reviewer.

Hispanic Unity of Florida, Inc.

Employee Signature _____ Date: _____

Employee Print Name _____

VITA Program Manager

Signature _____ Date: _____

“This job description is not an employment agreement or contract. Management reserves the right to amend this job description at any given time without prior notice”.

Updated: November 2017