



Quality Reviewer (Virtual)

Conduct quality review on completed tax returns, discuss results with taxpayers, and share feedback with tax preparers through Get Your Refund. This role requires you to have previous experience as a VITA volunteer. As a Quality Reviewer, you will be a role model to preparers on your team while ensuring every taxpayer we serve receives the best service possible.

What is VITA?

United Way of Tucson and Southern Arizona's VITA program is dedicated to providing free, quality tax preparation services to families and individuals throughout Arizona. By becoming a VITA volunteer, you can have a direct impact on the financial well-being of hundreds of households in your community by helping them maximize their refund and receive one of the largest paychecks they'll receive all year. As an intake specialist, you will be the first volunteer taxpayers interact with at a VITA site!

What will I do?

- Check completed tax returns for data entry and tax law errors
- Discuss and explain tax return results with taxpayers virtually through Get Your Refund
- Provide feedback to volunteer tax preparers, explaining identified errors and instructions for making the necessary corrections
- Provide support to virtual taxpayers as needed
- Maintain confidentiality of taxpayer information

What makes me a good fit?

- Previous experience as a VITA Tax Preparer volunteer
- Good interpersonal skills and comfortable working with a wide range of people
- Strong verbal and written communication skills
- Thorough attention to detail
- Interest in developing leadership skills
- Comfortable working with virtual tax preparation tools (Get Your Refund, Tax Slayer, Teams, etc.)

How much time will I spend volunteering?

- Minimum of 40 hours during tax season
- One day per week from mid-January to mid-April

What will I get out of it?

- Demonstrate a commitment to community service
- Satisfaction of knowing that you had a direct impact on our community
- Flexible volunteer hours
- Develop leadership skills with opportunity for advancement to Site Coordinator
- Gain knowledge about advanced tax topics
- Expand your resume
- Hands-on tax preparation experience
- Free IRS-approved tax preparation training by tax experts
- Gain experience in customer service and one-on-one taxpayer consultations
- The IRS certification counts toward continuing education for enrolled agents, accountants, and financial managers

How do we support you?

- Opportunities for development into Site Coordinator role
- Connections to other unique volunteer opportunities
- **Free** training and IRS VITA certifications

How do I get involved?

- Attend 3 hours of QR training
- Pass the IRS certification exam to achieve certification at the Advanced level
- Pass the IRS Standards of Conduct exam
- Pass the Intake/Quality Review exam
- Complete the Hub Training

Visit unitedwaytucson.org/vita/volunteer to get started!

