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| Job Title: | **Tax Preparer** |
| Department: | **Community Services/Financial Management Services/Tax Program** |
| Reports to: | **Financial Management Services Manager** |
| Grade: | **$14.00** |
| Supervises: | **N/A** |
| FLSA Status: | **Temporary Full-time** |
| Prepared by: | **Karen A. K. Emerson** |
| Date: | **February 1, 2021** |
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| Purpose:To support free tax preparation service for the underserved in NMCAA’s communities by preparing taxes for low-moderate income customers and assisting volunteers in regards to policies and procedures. |
| Essential functions:* Ensure compliance with IRS, DHS, and NMCAA policies and reporting requirements.
* Set up tax program sites including computer hardware and software.
* Provide expert advice and training to volunteers.
* Assist with tax preparation.
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| Position Objectives:* Work with Tax Program Staff to provide efficient and friendly service in seasonal tax preparation program.
* To represent NMCAA in a professional, supportive, and knowledgeable manner.
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| **Measured by:*** Annual performance reviews
* Annual ROMA reports
* Ongoing assessment
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| **Minimum Education:*** BS/BA or equivalent work experience
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| **Minimum Experience:*** 5 years’ previous experience.
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| **Essential Abilities:*** A commitment to the NMCAA philosophy and mission.
* Ability to maintain confidentiality.
* Ability to interact positively with co-workers and clients in a non-judgmental, tactful and courteous manner.
* Ability to suggest innovative approaches in completing job responsibilities.
* Ability to work openly and cooperatively as a team member.
* Ability to perform physical tasks to carry out specific job duties.
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| **Minimum Skills Required:*** Strong computer Skills with experience in data management and reporting.
* Excellent communication skills in customer service capacity.
* Good organizational skills and self-motivated.
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| **Minimum Physical Expectations:*** Physical activity that always requires keyboarding, sitting, phone work and filing.
* Physical activity that always requires extensive time working on a computer.
* Physical activity that often requires travel by car and/or air.
* Physical activity that often requires lifting under 25 lbs.
* Physical activity that sometimes requires bending, stooping, reaching, climbing, kneeling, and/or twisting to access files and records.
* Physical activity that sometimes requires lifting over 25 lbs. but not more than 50 lbs.
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| **Minimum Environmental Expectations:**The Tax Preparer operates in an office setting. This position routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets, and fax machines. Occasional travel between tax sites. |