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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. | |
| 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. | |
| **Measured by:**   * Annual performance reviews * Annual ROMA reports * Ongoing assessment | |
| **Minimum Education:**   * BS/BA or equivalent work experience | |
| **Minimum Experience:**   * 5 years’ previous experience. | |
| **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. | |
| **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. | |
| **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. | |
| **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. | |