

The United Planning Organization (UPO) is the designated Community Action Agency for Washington, District of Columbia, and has served the residents of the District since 1962. Our **Vision** for the future is “UPO’s Washington: A city of thriving communities and self-sufficient residents”; our **Mission** is “Uniting People with Opportunities.”

All qualified applicants are encouraged to apply for this position or any other position currently advertised on our website. Please visit us at www.upo.org to view all of our vacancies and to learn more about our company and services.

POSITION: Lead Quality Reviewer, UPO/Volunteer Income Tax Assistance (VITA) Program
PROGRAM/DIVISION: Community Reinvestment Division
BULLETIN No: 01012023
HOURLY RATE: \$25.00 per hour
OPENING DATE: January 3, 2023
CLOSING DATE: Open until filled
FIRST SOURCE: N/A
EMPLOYMENT TYPE: Part Time Regular/Temporary
(30 Hour Workweek) Without Benefits
Mondays, Tuesdays, and Thursdays-3:00 pm to 8:00 pm;
Wednesdays-10:00 am to 4:00 pm;
Saturdays-10:00 am to 2:00 pm, February 11, 2023, February 25, 2023,
March 18, 2023, and April 1, 2023.

MAJOR DUTIES:

Assist the Site Coordinator in ensuring the efficient operation of the tax site. Serve as lead tax preparer. Serve as the technical tax expert and lead tax preparer for the UPO/VITA Program. Assist the Site Coordinator in ensuring high quality tax preparation for program customers.

BRIEF DESCRIPTION:

Manage and ensure high quality of tax return preparation at tax site. Provide on-site tax expertise and preparation to program customers. Review tax returns completed by volunteer tax preparers, correct errors and ensure it is complete and accurate. Provide substantive tax knowledge and guidance to volunteer tax preparers and other program staff. Follow Community Tax Aid procedures. Help Site Coordinator manage workflow of the tax site. Work with individual responsible for electronically filing returns to ensure procedures are followed and problems in rejected returns are corrected on a timely basis. Ensure security of confidential information. Work with CTA to collect and report statistics and surveys relating to taxpayer information.

MINIMUM QUALIFICATIONS:

Three (3) years of experience as an IRS Certified Tax Preparer for individual income taxes or an Associate degree in accounting or a related field and 5 years of experience preparing individual income tax returns. Quality Reviewers must pass the IRS volunteer tax preparer certification exam at the advanced level within two weeks of hire. Experience at a VITA site in a quality control position is desirable. Excellent working knowledge of MS Office (Word, Excel, Outlook, and Power Point). Must be self-directed, detail oriented and organized. Available to work evenings and weekends. Must be able to work sensitively and effectively with individuals of diverse educational, socio-economic, and cultural backgrounds.

DESIRED QUALIFICATIONS:

Qualified IRS Certified Tax Preparer with a bachelor’s degree in accounting or a related field and 5 years of experience preparing individual income tax returns. Previous experience with volunteer low-income tax assistance programs.

OTHER REQUIREMENTS:

In the event that an offer is extended, the selected candidate will be required to successfully complete a criminal background check and/or FBI fingerprinting, as well as pre-employment drug screening, as applicable for the position.

POSITION ELIGIBLE FOR TELEWORK:

YES NO

ESSENTIAL POSITION:

YES NO

UPO designates an employee as essential if s/he is required to work during a business closure (e.g., federal/District holidays, snow closures, pandemic) in order to meet operational requirements. Essential employees who are **customer-facing (e.g., nurses, transportation, facilities) who deliver essential services** are not eligible for Teleworking/Remote Work.

Mayor’s Order 2021-099 - COVID-19 Vaccination Certification Requirement for District Government Employees, Contractors, Interns, and Grantees

This position IS NOT in the collective bargaining unit of the CWA Union.

ALL VISITORS TO UPO FACILITIES

- **Must Wear a Mask While on UPO Premises.**
- **Must Practice Social Distancing; and,**
- **Will Be Subject to Temperature Scanning Upon Entering UPO Facilities**

To be considered for this position: [Apply Here](#)

Submit your cover letter and resume to the Career Center Online.

UPO IS AN EQUAL OPPORTUNITY EMPLOYER