

VITA Greeter

Volunteer Position Description

The VITA Greeter is the initial point of contact for individuals and groups entering the VITA Program site. The VITA Greeter will greet all taxpayers visiting the site to create a pleasant, welcoming atmosphere.

Position requires the application of high ethical standards and adherence to United Way and Internal Revenue Service policies, procedures, and guidelines. The Greeter will participate in IRS-sponsored training that covers the Volunteer Standards of Contact which are critical for the VITA program.

Successful candidates will work well in a fast-paced environment. They will possess excellent customer service skills and a professional disposition when working with a wide variety of populations, including volunteers, tax clients, and UWECI staff.

Responsibilities

- Make calls to taxpayers scheduled for the following day to confirm appointments. support those without computer access in making appointments on website.
- Greet all taxpayers visiting the site to create a pleasant atmosphere. Record on appointment log, making note of any cancellations or “no-shows.”
- Review Out of Scope information with client(s).
- Verify clients have the following documents required for completion of a tax return:
 - Photo identification for taxpayer and spouse, if applicable
 - Social Security cards or ITIN (individual taxpayer identification number) for everyone who will be included on the return. This will include the taxpayer, spouse and dependents if applicable
 - Last year’s federal and state tax returns

- All income and expense documents to be included on the tax return (most frequently W2s and social security statements)
- Explain the return preparation process. Have clients open all envelopes in preparation of meeting with the tax preparer.
- Provide intake forms (Form 13614-C and 14446 if applicable) to the taxpayer for completion. Help them fill it out if needed.
- Monitor site traffic to ensure sufficient time is allowed for all taxpayers being checked in at the site to receive assistance.
- Maintain confidentiality of taxpayer information.

Impact

The Volunteer Income Tax Assistance (VITA) Program offers free federal and state tax return preparation to low-income families and individuals. In tax year 2024, volunteers brought over \$2.8 million in refunds back to our community.

Training

Complete volunteer training for the greeter role. Become certified in the VSC (Volunteer Standards of Conduct).

Support

The VITA site coordinator will serve as the direct supervisor for this role. For questions or concerns during the volunteer shift, greeters should always go to their site coordinator first. For program-related questions or anything that cannot be easily resolved with the site coordinator, please contact the Sr. Coordinator of Volunteer Engagement for your county.

Time Commitment

Greeters will complete approximately 3-4 hours of training and certifications each January. The volunteer time commitment averages between 3-5 hours per shift for the 10 week tax season, typically late January to early April.

Qualifications

Willingness to share time, skills, and interests. Work with the public in a helpful, friendly, dependable, and supportive manner. Pride in performing tasks completely and accurately.

Passing a background check is required for this role.

Benefits

55+ Initiative volunteer benefits include volunteer supplemental liability and accident insurance while actively volunteering, volunteer networking and recognition opportunities, and additional support from the 55+ Initiative county coordinator.