

VITA Intake Specialist

Volunteer Position Description

The VITA Intake Specialist will work with clients and fellow volunteers to interview eligible clients for the preparation of their income tax returns. This role coordinates for the overall flow and process at the tax sites, manages and supports volunteers, completes administrative tasks, and ensuring quality tax preparation services.

Position requires the use of web-based tax preparation software, the application of high ethical standards, and adherence to United Way and Internal Revenue Service policies, procedures, and guidelines. The VITA Intake Specialist will participate in IRS-sponsored training that covers income tax law for the types of returns that are within scope 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

- Review client intake form 13614-C and all supporting tax documents the client provides.
- Interview taxpayer to determine all income, deductions and allowable credits.
- Take thorough notes for the tax preparer to accurately complete the clients' taxes. Instruct the client on tax return pickup.
- Review the completed tax return with the client for accuracy. Have the client(s) sign the return and answer any tax related questions. Ensure a copy of the completed return is provided to the taxpayer.

- Ensure returns are in-scope of the VITA program at each step of the process. Refer taxpayers with out-of-scope returns to www.myfreetaxes.com for alternate return filing options.
- Maintain confidentiality of all client information.
- Promptly notify your site coordinator of any planned or unplanned absences and work with your site coordinator to find a fill-in volunteer. Track volunteer hours served.

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 Intake Specialist role. Become certified in the VSC (Volunteer Standards of Conduct) and Intake/Interview & Quality Review for the current tax year.

Support

The VITA Site Coordinator will serve as the direct supervisor for this role. For questions or concerns during the volunteer shift, intake specialists 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

Intake Specialists will complete approximately 18 hours of training and certifications each December and 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

Knowledge of tax preparation is helpful but not required. Work with the public in a helpful, friendly, dependable, and supportive manner. Detail oriented and takes pride in performing tasks completely and accurately. Ability to use and troubleshoot computer software for tax preparation purposes. 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.