

VITA (VOLUNTEER INCOME TAX ASSISTANCE PROGRAM) VOLUNTEER POSITIONS



GREETER

- Welcome and check in all attendees/taxpayers.
- Provide taxpayers with an intake folder and intake sheet.
- Directs taxpayers to the appropriate waiting area or explains the order of operations.

INTAKE SPECIALIST

- Welcome and orient the tax filers to the tax site.
- Provide taxpayers with intake forms and answers non-tax questions.
- Ensure the taxpayer has brought all required documents to verify taxpayer identity and complete tax return.
- Determine if the return is within the scope of returns we are allowed to do and determine which certified volunteer can prepare the return.
- Manage waiting and entry areas to maintain the flow of taxpayers according to site operational procedures.
- Refer taxpayers to Tax Preparers or Site Coordinators for tax questions.
- Inform taxpayers about other community resources if and when necessary.

TAX PREPARER

- Interviews taxpayers using the IRS Intake/Interview & Quality Review Sheet.
- Provide high-quality tax return preparation to taxpayers who qualify for VITA assistance.
- Prepare only returns that are within their certification level(s) and within the scope of the program.
- Enter tax information into the TaxSlayer software.
- Obtain signatures for E-File authorization.
- Answer questions and/or use available resources to assist taxpayers.
- Always adhere to Quality Site Requirements and Volunteers Standards of Conduct.
- Maintain taxpayer privacy and confidentiality standards.

INTERESTED IN VOLUNTEERING?

Fill out the VITA Volunteer Form on our website: www.unitedwaynwla.org/vita-volunteer-application/. You can also contact Rashida Dawson, Vice President of Financial Stability, at rashida@unitedwaynwla.org or call **318-677-2504**.