

VITA Intake & Exit Specialist Description

Our VITA (Volunteer Income Tax Assistance) Program provides free tax preparation to low/middle-income individuals and families, allowing them to receive the maximum refund possible, to meet their own pressing basic needs or save for the future, without being subject to costly fees or predatory refund-anticipation loans. To apply, visit uwgive.org/volunteerforvita and complete our brief Volunteer Interest Form. Contact our VITA Team with questions anytime at vita@uwwashtenaw.org.



United Way
of Washtenaw County

Benefits of Volunteering

- Engage in gratifying volunteer work – interact directly with the people you are helping and see the immediate impact of your work
- Develop/refine new or existing skills; gain valuable experience in preparing income tax returns and encountering various tax issues
- Develop/refine client counseling skills in a protected environment
- Networking/resume building opportunity

Duties

- Provide top-notch customer service with empathy and compassion
- Greet participants and help them feel at-ease
- Manage intake and exit process
- Check that participants have required documents to start return
- Assist participants with scheduling or re-scheduling appointments
- Serve as liaison with Site Coordinator to determine clinic capacity for walk-ins, or other participant issues/questions that arise at Intake
- Conduct "scan & go" intake procedure for walk-ins that we are unable to serve

Training & Time Commitment

- Attendance at **VITA 101** 3-hr training session required. (Various dates in Dec & Jan, registration required)
- Approximately 1 hour of self-study and completion of Volunteer Standards of Conduct certification exam required.
- Minimum of **ten** 3.5 hour shifts between the first week of February through early April
- Shifts are available one weekday 11:45am-4pm, 3:45-7:00pm, Saturdays 9:45am-1pm or 12:45-4pm

Volunteer Requirements

- Ability to have empathy for others and provide top-notch customer service
- Attend required in-person training & pass IRS Ethics certification exam
- Ability to accurately follow written instructions
- Competency with the use of computers and copier, or willingness to learn
- Must be 16 or older.