



# Intake Volunteer Description

## CA\$H Coalition/VITA Overview:

The Onondaga County CA\$H Coalition helps low-to-moderate income individuals and families increase financial stability and empowerment. We promote the Earned Income Tax Credit and other valuable tax benefits, provide free tax filing services and offer financial education and coaching through Coalition members to empower people in our community to better understand their options when it comes to spending, saving, and borrowing. Our goal is to help families build assets, use credit wisely and ultimately achieve financial security.

In order to provide free tax preparation through our Volunteer Income Tax Assistance program, a service that brought over \$6 million back to our community through refunds last year, we rely on community members like you to volunteer by establishing and organizing sites, assisting taxpayers with paperwork, preparing taxes, and reviewing returns for quality and accuracy.

## Volunteer Position Overview:

The Intake Specialist volunteer is the first person our taxpayers will see when they walk into the VITA site. The intake specialist provides support to taxpayers, takes in their tax documents, helps the taxpayer complete their intake sheet and ensures that they have the materials and the information necessary to complete their virtual tax preparation appointment. Necessary forms will be sent to taxpayers ahead of time whenever possible to limit time spent in person. Intake will be by appointment only and barriers will be used to limit contact.

## Duties and Responsibilities:

- Manage waiting and entry areas to maintain minimum number of people in site at any given time, disinfect high traffic areas, and ensure that taxpayers wear proper PPE throughout intake
- Greet all taxpayers visiting the site
- Provide taxpayers with intake forms, answer questions that are not tax-related, and assist with completion of forms as necessary
- Confirm that the return is within the scope of the VITA program and confirm appointment with tax preparer
- Ensure the taxpayer has brought all required documents, verify taxpayer identity, and intake or scan tax payer documents, depending on site operations
- Adhere to Quality Site Requirements and Volunteer Standards of Conduct at all times
- Refer taxpayers to Tax Preparers or Site Coordinators for tax questions
- Maintain confidentiality of all records and taxpayer information.

## Qualifications and Skills:

- No prior experience or tax certification is necessary, but must complete the Volunteer Standards of Conduct and Intake/Interview & Quality Review exams with training provided by VITA
- Ability to work with the public in a helpful and supportive manner
- Strong interpersonal communication skills with people from diverse cultures and life circumstances
- Second language and ASL skills are preferred and appreciated

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