



VITA Volunteer Position and Training Descriptions

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.

Training and COVID Considerations

To ensure the safety of our staff and volunteers, all VITA training will be held virtually. Four training sessions will be held throughout December and January. Only one training session is required, but you may attend more if you want additional practice and instruction. The certification tests required for volunteering are administered through Link and Learn, an online platform administered by the IRS. VITA staff will help you set up an account during the training process. These tests are open book and open note. While there may be in-person opportunities for greeters to receive tax documents and do intake processes with clients, all other volunteer positions will be done virtually or at a socially-distanced site depending on the volunteer's comfort level and state regulations. In-person intake will be done quickly and by appointment only and PPE usage will be enforced. At no time during this season will any volunteer engage in face-to-face return preparation with taxpayers.

Intake Specialist (Greeter)

The intake specialist does all the in-person work needed for a tax preparer to virtually complete the return later. The intake specialist greets the taxpayer at the site, assists them with completing intake forms and sends taxpayer information to the tax preparer, then confirms the virtual appointment for the taxpayer. 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.

Certifications: Intake/Interview Certification, Volunteer Standards of Conduct; certifications can be earned through a short training and online tests administered by the IRS. All training and certification are provided by VITA program, no prior experience is necessary.

Hours needed: Short morning, afternoon, and evening shifts, 3-10 hours/week during tax season depending on volunteer availability

For more information contact Meredith Ouder Kirk at (315) 428-2220 or mouderkirk@unitedway-cny.org

Tax Preparer - Virtual

The tax preparer receives taxpayer information and completes the return over a virtual meeting with the taxpayer. The tax preparer then sends the return to a quality reviewer to ensure accuracy. This volunteer position can be done entirely from home, provided that the volunteer has a secured wifi network and access to a personal, password protected computer.

Certifications: Intake/Interview Certification, Volunteer Standards of Conduct, at least Basic Tax Law Certification; Volunteer tax preparation certification at the basic level typically takes those with no tax experience eight hours between training, solo study and test taking. All training and certification are provided by VITA program, no prior experience is necessary.

Hours needed: Morning, afternoon, and evening shifts, 5-10 hours/week during tax season depending on volunteer availability

Quality Reviewer – Virtual

Every tax return completed in the VITA program gets reviewed by the preparer and an additional quality reviewer. The quality reviewer goes over the information in the return with the taxpayer and ensures that it is accurate before the return is submitted to the IRS.

Certifications: Intake/Interview Certification, Volunteer Standards of Conduct, at least Basic Tax Law Certification; Volunteer tax preparation certification at the basic level typically takes those with no tax experience eight hours between training, solo study and test-taking. All training and certification is provided by VITA program, no prior experience is necessary.

Hours needed: Morning, afternoon, and evening shifts, 5-10 hours/week during tax season depending on volunteer availability

Site Coordinator

The site coordinator oversees site operations, manages volunteers and acts as a liaison between the volunteers at the site, the VITA Program Coordinator, and the IRS. With the exception of infrequent site visits, and ensuring that needed materials such as printer paper, ink and computers are well stocked and stored at the site, coordinators can volunteer virtually as long as they are available via phone whenever operations associated with the site are taking place.

Certifications: IRS-approved site coordinator training, Intake/Interview Certification, Volunteer Standards of Conduct, at least Basic Tax Law Certification; Volunteer tax preparation certification at the basic level typically takes those with no tax experience eight hours between training, solo study and test-taking. All training and certification are provided by VITA program, but for site coordinators, prior experience managing volunteers or preparing taxes is preferred.

Hours needed: 10-20 hours/week during tax season with some site preparation work required
November-December