



Intake Specialist (Virtual)

Help keep taxpayers flowing through the Get Your Refund process by screening tickets for required documents and assisting the team with situations that require additional assistance. This role **does not** require tax training. As an intake specialist, you will be a vital part of ensuring every taxpayer has a great experience with United Way of Tucson and Southern Arizona's Virtual VITA program.

What is VITA?

United Way of Tucson and Southern Arizona's VITA program is dedicated to providing free, quality tax preparation services to families and individuals throughout Arizona. By becoming a VITA volunteer, you will have a direct impact on the financial well-being of hundreds of households in your community by helping them maximize their refund and receive one of the largest paychecks they'll receive all year.

What will I do?

- Screen tickets to verify that required documents are present and readable
- Contact taxpayers for to complete intake interview and identify additional information/documents necessary for tax preparation
- Provide guidance and resources for identifying and obtaining necessary documents
- Maintain communication with unresponsive taxpayers
- Work with GYR tech support on tickets that have stalled due to technical issue
- Resolve tickets for taxpayers that remain unresponsive over an extended period
- Maintain confidentiality of taxpayer information

What makes me a good fit?

- Good interpersonal skills and comfortable working with a wide range of people
- Thorough attention to detail
- Comfortable working with virtual tax preparation tools (Get Your Refund, Tax Slayer, Teams, etc.)
- Strong verbal and written communication skills
- Ability to walk through a well-defined process step by step

How much time will I spend volunteering?

- Minimum of 40 hours during tax season
- One day per week from mid-January to mid-April

What will I get out of it?

- Demonstrate a commitment to community service
- Satisfaction of knowing that you had a direct impact on your community
- Flexible volunteer hours
- Gain knowledge about taxes and develop a lifelong skill
- Opportunities to advance into more experienced roles
- Expand your resume
- Hands-on field experience in case management
- Gain experience in customer service

How do we support you?

- Mentorship from highly experienced volunteers and United Way staff
- Opportunities for development into leadership roles
- Connections to other unique volunteer opportunities
- **Free** training and IRS VITA certifications

How do I get involved?

- Attend 3 hours of training (in-person or online at your own pace)
- Complete Valet and the Hub training
- Complete the IRS Standards of Conduct test
- Pass the Intake/Quality Review exam

Visit unitedwaytucson.org/vita/volunteer to get started!