



Intake Specialist

Conduct one-on-one interviews with taxpayers and review their documents to ensure that the taxpayer is ready for tax preparation. 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 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?

- Greet taxpayers and manage the waiting area
- Conduct a thorough intake interview
- Verify that required documents and tax forms are present
- Upload the taxpayers' documents to the Hub (Valet)
- Set appropriate prep time expectations (Valet)
- Maintain confidentiality of taxpayer information

What makes me a good fit?

- Strong verbal and written communication skills
- Good interpersonal skills and comfortability working with a wide range of people
- Thorough attention to detail
- 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 shift 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
- Gain knowledge about taxes and develop a lifelong skill
- Opportunities for advancement into more experienced roles
- Expand your resume
- Hands-on field experience in case management
- Integrate theory and practice outside of the classroom
- 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
- Pass the IRS Standards of Conduct exam
- Pass the Intake/Quality Review exam

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