

FREE TAX PREP



Tax Intake Specialist Volunteer

The Earned Income Tax Credit and Child Tax Credit lift more working families out of poverty than any other program. However, to access the credit, many low-income families pay hundreds of dollars in tax prep fees. Through the Volunteer Income Tax Assistance (VITA) program, low-income families can access these vital tax credits without paying any preparation fees.

The Free Tax Prep (FTP) Coalition has VITA sites located throughout Allegheny County and the surrounding areas. At the Robert Morris University site, we welcome current matured high school students to volunteer with us as a Tax Intake Specialist.

As an Intake Specialist at the Robert Morris University VITA site, you will meet with taxpayers to coordinate the check-in process, ensure they have all of the paperwork needed to accurately prepare their return, and make referrals to connect households with relevant community resources. Careful completion of the interview process helps to ensure that taxpayers receive all credits that they are eligible for. This is an excellent opportunity for students interested in business, accounting, social work, public policy, finances, and other majors.

Volunteer Responsibilities

- Attend and complete IRS training sessions – this includes both online self-study as well as live webinar trainings.
- Sign IRS Form 13615, Volunteer Standards of Conduct Agreement (and parental consent.)
- Courteously greet taxpayers and conduct intake interviews in person.
- Exhibit excellent attention to detail in the interview process.
- Maintain confidentiality.
- Assist with the smooth operation of tax site, including paperwork and other duties as necessary.

Time Commitment: Tax Intake Specialist are required to commit **2-4 hours on Saturdays** each week for the duration of tax season (February – mid-April).

Skills required

- Proficient with technology and have the ability to coach taxpayers through the use of technology.
- Basic understanding of taxes, and a willingness to learn.
- Strong communication skills and the willingness to discuss sensitive matters with empathy and respect.
- Must be comfortable interacting with people of diverse backgrounds, education levels, economic statuses, and cultures.

Training: Expect to spend about 6 hours in training and testing during the first three weeks of January. Ongoing training and support is provided throughout tax season.

To apply: Fill out a volunteer application at <https://www.rmu.edu/vita>

Contact freetaxes@rmu.edu with any questions.

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IRS rules:

VITA/TCE HIGH SCHOOL PROGRAM VOLUNTEER GUIDELINES

Beginning with tax season 2021, high school-based programs engaging with student or minor volunteers are subject to the following volunteer guidelines regarding age, proof of identity, and parental/guardian permission for minor children.

- SPEC Headquarters has not set a minimum age for volunteers. SPEC territories or partners may choose to implement minimum age requirements.
- Volunteers (of any age) need to pass the required certifications (including Volunteer Standards of Conduct) and must (based on the partner's judgment) perform the essential functions of the position(s) they are assigned.
- Minor children can prepare returns but are not permitted to perform quality reviews of completed tax returns and/or volunteer as a coordinator or alternate coordinator.
- Volunteers are required to show government-issued photo identification (ID) to the coordinator prior to working at the site. Coordinators can make exceptions to use official high school identification for students volunteering at or for an official VITA/TCE High School Program.
- Form 13615, Volunteer Standards of Conduct Agreement - VITA/TCE program, now include signature line for parents and/or guardians, to grant permission for their minor children who volunteer in the VITA/TCE program. Exception: Parents and/or guardians are not required to sign Form 13615 for their minor children if the VITA/TCE High School-based Program has an alternative consent requirement.