



Orange County United Way

2021-22 Tax Filing Season OC Free Tax Prep Campaign Volunteer Income Tax Assistance (VITA) Paid Student Internship

Orange County United Way (OCUW) continues to be impressed by the dedicated VITA volunteers coming from Orange County's local colleges and universities. OCUW is pleased to facilitate a skills based learning opportunity for a select number of students through a paid internship.

General Overview

OCUW will host paid student interns for Tax Filing Season. Interns will serve as Assistant VITA Site Coordinators at designated OCUW partner sites throughout Orange County. The internship allows students to gain experience managing free tax preparation events while working with VITA volunteer tax preparers and local taxpayers during tax season. OCUW will provide interns a stipend of \$1,500 at the end of tax season.

Learning Objectives

Students participating in the VITA Internship will have the opportunity to:

- 1) Learn to correctly apply Federal and State of California tax laws within the scope of the VITA program by completing the necessary trainings and successfully passing the Volunteer Standards of Conduct and Advanced Certification Exams on IRS.gov, Link and Learn Taxes, by January 15, 2022. Attendance will be tracked and reported by OCUW staff. Examination scores will be electronically displayed on IRS FORM 13615, Volunteer Standards of Conduct Agreement.
- 2) Increase accurate application of Federal and State of California tax laws by routinely utilizing Internal Revenue Service (IRS) and Franchise Tax Board (FTB) publications when answering taxpayer and volunteer questions during free tax preparation events scheduled at selected sites from January through April 18, 2022. This objective will be measured by the site's e-file rejection rate as reported by the IRS.

Responsibilities

Paid interns will take on the role of Assistant Site Coordinator at various VITA sites throughout Orange County, and responsibilities include, but may not be limited to:

- Work under the guidance of the Site Coordinator to ensure smooth and successful tax days throughout the tax season, implementing both the VITA and MyFreeTaxes.com platforms;
- Assist program volunteers with the volunteer log-in and sign-out process;

- Assist VITA volunteers in their respective roles at free tax preparation events;
- Ensure VITA site operations meet the IRS' Quality Site Requirements and OCUW's VITA Protocol;
- Answer tax law questions (act as "go to" person) during free tax preparation events;
- Perform Intake Interviews, Tax Preparation, and Quality Reviews (review federal and state tax returns for accuracy), when necessary;
- Assist in transmitting prepared returns to the IRS and FTB, if requested;
- Ensure that taxpayers complete the customer satisfaction SurveyMonkey survey;
- Collect high quality stories, testimonials, and photographs of VITA site volunteers and clients;
- Provide great customer service and,
- Share site results and feedback with OCUW's Program Manager.

Training and Certification Requirements

The IRS VITA certification deadline is January 15, 2022. Assistant Site Coordinators **must** complete the following training and certification requirements:

1. Register as a Site Coordinator for testing purposes on VITA Central at IRS.gov, Link & Learn Taxes.
2. Complete and pass the Volunteer Standards of Conduct, Intake & Interview/Quality Review, and Advanced Certification Exams on VITA Central at IRS.gov, Link & Learn Taxes.
3. Attend one (1), the OCUW Site Coordinator or Assistant Site Coordinator in-person training if provided.
4. Review the MyFreeTaxes.com training materials provided by OCUW and become familiar with the MyFreeTaxes online software available at www.myfreetaxes.com TBD
5. Submit a signed FORM 13615, Volunteer Standards of Conduct Agreement indicating passing scores to Orange County United Way's Program Manager, Omid Missaghian at OmidM@unitedwayoc.org by January 15, 2022.

Training Hours

Approximately 6 to 10 hours. Total hours based on previous knowledge and experience. Training sessions are available from November 2021 through January 2022 online. Training and certification must be completed prior to service.

Internship Hours

Tax Filing season runs mid-January to mid-April. Interns will be assigned to specific agencies at which to serve as Assistant Site Coordinators. Intern may be assigned to more than one partnering agency site. Schedules are to be confirmed with OCUW Program Manager prior to the season's start. Minimum required: 80 hours for the season. Interns typically serve 80-110 hours per season.

Qualifications

- Knowledge of federal and State of California tax return preparation and transmission process.
- Minimum 1-season experience serving as VITA volunteer tax preparer.
- Ability to work evenings and weekends.
- Excellent organizational and time management skills with strong attention to detail.
- Excellent written, verbal, presentation, research, and interpersonal skills.
- Interest in working with volunteers.
- Proficiency in Microsoft Office Suite (Word, Excel, etc.).

How to Apply

Students interested in serving as Assistant VITA Site Coordinators will need to submit:

1. Resume, *and*
2. Maximum 2-page application including:
 - a) Why you wish to be an Assistant Site Coordinator for the VITA program with the OC Free Tax Prep Campaign.
 - b) What city/county/state did you complete prior VITA volunteer service (if any).
 - c) What is your availability? (Days of week and time)
 - d) Confirmation that you can work evenings and Saturdays.
 - e) Your name, email, phone number, current school, year, and degree program.

Resume and application are due by 12/01/2021 to Omid Missaghian, Program Manager via email at OmidM@UnitedWayOC.org