



**ORANGE COUNTY UNITED WAY
JOB ANNOUNCEMENT**

Job Title: Program Specialist, Hotline, VITA (Volunteer Income Tax Assistance)	Reporting To: Senior Program Manager
Department: United for Financial Security	Position: Seasonal/Temporary, W-2 30-35 hours/week, M-F, hours may vary December through April
Compensation: Hourly \$20.00 - \$25.00 depending on the Experience & Tax Knowledge	Location: Orange County United Way 18012 Mitchell South, Irvine, CA 92614

Summary

United Way’s OC Free Tax Prep (OCFTP) program educates the community about Federal and California Earned Income Tax Credit and offers free tax preparation services to low and moderate income taxpayers throughout Orange County by participating in the Internal Revenue Service (IRS) Volunteer Income Tax Assistance (VITA) Program. The program is a partnership with the IRS, Franchise Tax Board, and over 30 local organizations. OCFTP is part of Orange County United Way’s United for Financial Security, which assists residents to go from surviving to thriving.

Purpose of Position

The VITA Program Specialist is part of the OC Free Tax Prep team and provides courteous and prompt support to callers of the Tax Appointment Hotline. The VITA Program Specialist will answer telephone calls regarding the 2022-23 Filing Season, Earned Income Tax Credits, and Free Tax Prep qualifications. Program Specialist will screen and direct qualified callers to available free tax preparation sites in Orange County.

Key Duties and Responsibilities

Under the direction of the Senior Program Manager, the Program Specialist will:

- Complete necessary VITA training and certification tests
- Attend Hotline Training
- Respond to all Appointment Hotline phone calls providing courteous and accurate service
- Screen callers for free tax filing eligibility
- Schedule free tax filing appointments for callers when appropriate
- Direct callers to available free tax preparation sites when appropriate
- Direct callers to 2-1-1 OC for needs outside of free tax filing services
- Direct callers to OCUW’s Covered CA Enrollment Counselors when appropriate
- Attend relevant meetings and committees as directed by Senior Program Manager

- Assist at free tax preparation events when needed as an Assistant Site Coordinator, and Quality Reviewer
- Complete additional related tasks when requested

Qualifications

The ideal VITA Program Specialist will have the following education and skill requirements:

- Excellent verbal communication, listening, and problem solving skills
- Be computer literate and have comfort scheduling callers through an on-line database system
- Experience with hotline, call-center, or customer service preferred
- Ability to work independently in a fast-paced setting
- Ability to successfully complete IRS VITA training and certification requirements through the Advanced Level
- GED and/or some college experience
- Bi-lingual Spanish or Vietnamese a plus

Training:

All staff are required to pass (at minimum) the online IRS certifications in Basic, and Advanced once hired. While all training is self-paced and can be completed online, you will be offered several days in-house to complete your certifications in December. Training is online and in-person through IRS and OC United Way. Exams are multiple choice and open book.

Physical Demands:

The physical demands described here are representative of those that must be met by staff to successfully perform the essential functions of this job. The staff member is required to talk and hear in-person and on the phone. The staff is often required to sit and use their hands and fingers to handle or feel. The staff member is required to stand, walk, and reach with arms and hands. Vision abilities required by this job include close vision.

Schedule

30-35 hours/week, Monday-Friday, hours may vary.

If your schedule allows, you may be asked to assist with tax preparation events on evenings and weekends.

Send Resumes To:

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Orange County United Way
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www.unitedwayoc.org