



VITA Greeter/Intake Specialist

Position Overview: The VITA Greeter/Intake Specialist plays a vital role in welcoming clients to our tax assistance site and ensuring they have everything needed for a successful tax preparation experience. As the first point of contact, you will help clients feel comfortable, assist them in completing initial paperwork, and verify that they have the required documents. Your role is essential in creating a positive experience and facilitating a smooth tax preparation process.

Responsibilities:

- **Greet Clients:** Provide a warm, welcoming atmosphere as clients arrive. Offer assistance, answer general questions, and guide them through the initial steps of the process.
- **Document Verification:** Review clients' documents to ensure they meet VITA program eligibility requirements and have all necessary forms for tax preparation.
- **Client Intake:** Conduct brief intake interviews to gather essential information and assist clients with completing intake forms accurately.
- **Site Flow Management:** Help manage the flow of clients through the tax preparation process by directing them to the appropriate waiting areas and coordinating with tax preparers to minimize wait times.
- **Confidentiality and Security:** Uphold IRS standards for confidentiality and information security, ensuring clients' personal information is handled securely and respectfully.

Certification Requirements:

- **IRS Certification Tests:** All VITA volunteers must pass IRS certification tests. Your role as a Greeter/Intake Specialist requires passing the following:
 - **Volunteer Standard of Conduct**
 - **Intake Interview/Quality Review**
- No prior experience is necessary. Free training and materials are provided by Trident United Way in January to help you prepare, with online self-study training available starting in December.

Qualifications:

- Friendly, welcoming demeanor with strong interpersonal skills.



- Ability to communicate effectively with people from diverse backgrounds.
- Good organizational skills and attention to detail to verify documents and complete intake accurately.
- Basic understanding of VITA program procedures and confidentiality requirements (training provided).
- Experience with customer service or client intake is a plus.

Commitment: Greeter/Intake Specialists are encouraged to volunteer for multiple shifts per week during the tax season (January through April). Shifts are typically 5-6 hours.

Benefits of Volunteering as a VITA Greeter/Intake Specialist:

- Gain experience in client support, intake processing, and community service.
- Make a direct impact by helping individuals and families access free tax assistance.
- Work in a collaborative, supportive environment alongside other dedicated volunteers.

Sign Up Today! Join our team as a VITA Greeter/Intake Specialist and help make tax season easier for community members in need!