CA$H Greater Portland IN-PERSON Volunteer Tax Preparer IRS-Certified

Associated Department/Project: Community Impact, CA$H Greater Portland

Location(s): In-person opportunity at UWSM and/or other designated tax sites in Greater Portland; serving Cumberland County clients, primarily

Position Overview:
CA$H Greater Portland (Creating Assets, Savings and Hope) is an initiative of United Way of Southern Maine in partnership with the Greater Portland CA$H Coalition, community leaders and industry experts working together to help individuals and families to achieve long-term financial stability. As part of CA$H's tax preparation service, IRS-Certified Volunteer Tax Preparers prepare and file federal and state income taxes for low-to-moderate households for free. Participants often learn that they qualify for tax credits, like the Earned Income Tax Credit, which can put thousands of dollars back into their pockets. IRS-Certified Volunteer Tax Preparers are supported by Opportunity Guide volunteers who share financial education tools and community resources that can help clients make the most of their money.

Diversity Statement:
Diversity, equity, and inclusion are vital to achieving our mission, living our values, and advancing the common good. United Way of Southern Maine fosters and promotes an inclusive environment that leverages the unique contributions of diverse individuals and organizations in all aspects of our work. We know that by bringing diverse individuals and viewpoints together we can more effectively create opportunities for a better life for all. For our full Diversity and Inclusion statement: https://uwsme.org/diversity-inclusion/

Key Responsibilities:
- Successfully certify in the IRS Link & Learn Standards of Conduct, Intake/Interview & Quality Review, and Basic and/or Advanced Tax Law courses.
- Keep up to date on tax law guidelines and tax site policies provided by the Tax Site Coordinator.
- Commit to sign up and volunteer for a minimum of 10 tax preparation events between late January and the tax filing deadline (mid-April) unless other arrangements have been made with staff.
- Meet with clients face-to-face during events to confirm information provided on intake forms and ask questions to obtain relevant information regarding income, deductions, and allowable credits.
- Prepare federal and state income tax returns based on information provided by taxpayers using the program's electronic filing software and guidelines.
- Follow all confidentiality and technology security guidelines described in the Publication 4299 and by program staff.
- Complete only those tax returns within scope of certification and agree to accept no compensation of any kind for volunteer services provided.
- If also participating as a Quality Reviewer (optional), ensure the return is complete and accurate based on the information provided, print a copy and explain key elements to the client, and ensure they understand their responsibility for its contents and sign the Form 8879 authorizing us to e-file the return.

Initial Impacts:
- Volunteers will ensure qualifying taxpayers receive quality free tax preparation services.

Sustained Outcomes:

- In support of Thrive2027's Goal 2, CA$H volunteers' efforts contribute to the financial stability of individuals and families in Cumberland County who may save money, receive refunds, and/or access important credits and resources as a result of free tax preparation services.

Training & Support Provided:

- Volunteers will access free comprehensive orientation and training through the IRS and UWSM, including Volunteer Standards of Conduct, Intake/Interview & Quality Review, and Basic and/or Advanced Tax Law, as well as the flow of the in-person tax site operations.
- Training is offered online through self-study and supplemented with live and recorded Zoom trainings.
- Volunteers may seek guidance from other volunteers and the Tax Site Coordinator during events.

Time Commitment/Schedule:

- To meet program goals and client demand, volunteers are asked to commit to a minimum of 3 hours per week during the last week of January through mid-April 2026, unless other arrangements have been made with staff. Events at the UWSM Portland office will be held on Wednesday and Thursday evenings from 2 PM to 5 PM and 5 PM to 8 PM. Additionally, we will be open on Saturday mornings from 9 AM to 12 PM and afternoons from 12 PM to 3 PM from January 27 through April 11, 2026.
- Tax preparers are welcome to join Zoom meet-ups with virtual tax preparers to receive additional support and guidance, share expertise, and hear important program updates.
- Special events, such as American Sign Language Tax Day, will occur on specific dates and may require modifications to the usual operations.

Qualifications & Skills Needed:

- Volunteer should have the ability to study and achieve IRS Volunteer Income Tax Assistance (VITA) "Basic" tax preparer certification ("Advanced" is encouraged for returning volunteers) and submit proof to UWSM via the IRS Standards of Conduct Agreement prior to volunteering.
- Volunteer must be able to pass a background screening.
- Volunteer should have basic computer skills necessary for entering client income tax information and navigating web-based programs.
- Volunteer should be comfortable working with the public in a friendly, helpful, and supportive manner.
- Volunteer should be willing to have one-on-one conversations with tax site clients and use strong communication skills to successfully complete client interviews (training will be provided).
- Volunteer must ensure taxpayer information is protected at all times. (See technology security agreement and Publication 4299 for full details.) CA$H laptops will be provided on-site.

Benefits:

- Volunteers will increase their knowledge of tax law and be able to put it to use to benefit the community.
- Volunteers have the opportunity to meet like-minded individuals who care about making a difference in the community.
- Volunteers receive free meals during shifts.

Staff Liaison/Supervisor: Patrick Robinson, CA$H Greater Portland Tax Site Coordinator; Lucia Rico CA$H Senior Volunteer Manager, and Pamela Bennett additional UWSM contact for the CA$H program.