CA$H MAINE
Creating Assets, Savings & Hope
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United Way of Southern Maine

VIRTUAL Volunteer Tax Preparer IRS-Certified

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

Location(s): Virtual opportunity completed online from volunteer's home or workplace; 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 Virtual 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 Virtual Volunteer Tax Preparers are supported by virtual 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 work on and prepare a minimum average of 3-5 returns per week from your home or workplace and attend (or check in at) at least one tax preparer meet-up (via Zoom) per week to receive support and guidance.
- Interview tax site clients by phone using the GetYourRefund platform to confirm information on intake forms and collect 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 client management software procedures and guidelines.
- Update the status of the return during each step of the process in GetYourRefund and respond to client's messages through the system.
- 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), digitally send the client a copy of their return (if client has email) and explain key elements to the client by phone. The Quality Reviewer ensures the return is complete and accurate, and that the client understands their responsibility for its contents, before ensuring the client digitally signs the Form 8879 (or returns to the Scan & Go site to sign and receive a paper copy), agreeing to have the return e-filed.

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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 how to navigate GetYourRefund for virtual client management.
- Training is offered online through self-study and supplemented with live and recorded Zoom trainings.

Time Commitment/Schedule:

- To meet program goals and client demand, volunteers are asked to commit to prepare a minimum average of 3-5 returns per week (~3-5 hours, more welcome!) late January through early mid-April 2025.
- Virtual tax preparer meet-ups (via Zoom) where volunteers may receive support and guidance while filing taxes, share expertise, and hear important program updates will be held at least twice a week (times TBD closer to tax season). Volunteers are asked to attend (or check-in) during at least one session per week.
- Optional special events, such as American Sign Language Tax Day, will occur on specific dates and may require modifications to the usual virtual 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 phone conversations with tax site clients and use strong communication skills to successfully complete client interviews (training will be provided).
- Volunteer must use a secure, password protected WiFi internet connection at their home or workplace and ensure taxpayer information is protected at all times. (See technology security agreement and Publication 4299 for full details.) Arrangements to borrow a CA$H laptop may be made.

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 (virtually) meet like-minded individuals who care about making a difference in the community.

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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.