



**ORANGE COUNTY UNITED WAY
JOB ANNOUNCEMENT**

Job Title: OC Free Tax Prep: Site Coordinator, VITA (Volunteer Income Tax Assistance Program)	Reporting To: Senior Program Manager, United for Financial Security
Department: Community Impact	Position: Part-time/Temporary December 2024 to April 2025

Summary

United Way’s OC Free Tax Prep (OCFTP) educates the community about the Earned Income Tax Credits 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 and by encouraging self-filing online through MyFreeTaxes.com. The Campaign is a partnership with the IRS, Franchise Tax Board, and over 30 local organizations. OCFTP is part of Orange County United Way’s Income strategies, which assist residents to become financially independent by focusing on education and services that build financial stability.

Purpose of Position

Manages free tax preparation sites and events hosted by Orange County United Way within Orange County (locations to be determined based on availability).

Key Duties and Responsibilities

- Performs all responsibilities that will ensure the safe and efficient operation of the VITA sites, including maintaining privacy and confidentiality of taxpayer information
- Coordinates with Senior Program Manager on all aspects of site management, IRS and program requirements, and e-file administration
- Assists with outreach to Orange County residents, students and workers, increasing awareness about the program
- Manages VITA site operations during the tax season and ensure sites are open as scheduled and adequately staffed to meet the demand of appointments
- Ensures that all volunteers working at the site have completed the required certification and recognize and appreciate volunteers
- Ensures that all volunteers working at the site have the proper tools and information to *accurately* file tax returns
- E-Filing/Transmission and Quality Review:
 - Acts as the e-file administrator (ERO)
 - Reviews tax returns to be e-filed to ensure quality and completeness
 - E-files returns within 48 hours of preparation
 - Maintains files for accepted returns and paper returns
 - Reviews rejects and informs tax filer within 24 hours. Take necessary action to fix the problem and resubmit the tax return
- Attends relevant IRS and United Way meetings as directed
- Assists at United Way free tax preparation events
- Completes additional related tasks when requested
- Represents the work of United Way professionally and responsibly

Qualifications

The ideal Site Coordinator will have the following education and skill requirements:

- Prior VITA experience required – familiar with TaxSlayer Software
- CPA, CPA Candidate, CTEC or EA preferred
- Associate or Bachelor degree in accounting, tax, or related-field preferred
- Required to pass (at minimum) the online IRS certifications in Basic, Advanced, and Health Savings Account once hired and prior to teaching
- Experience in Customer Service and Problem-Solving Skills
- Must be available to work flexible hours, evenings and Saturdays
- Ability to manage and coordinate an all-volunteer staff
- Ability to work independently in a fast-paced setting
- Ability to work under pressure
- Demonstrates proficiency in analytical skills
- Ability to work with Microsoft Excel

Training

Classroom training or self-study through IRS Link and Learn and a passing score of 80% or more on the tax law and standards of conduct exams at the Advance level. A special IRS Site Coordinator training is also required. This course covers all the quality site requirements and other administrative items necessary to effectively operate a VITA site.

Physical Demands

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this Job, the employee is frequently required to be able to remain in a stationary position 75% of the time. The person in this position needs to occasionally move about inside the office to access file cabinets, records, and office machinery. Constantly operates a computer and other office productivity machinery, such as a calculator, copy machine and computer printer. Occasionally ascends/descends stairs, and constantly positions self to maintain computers in the office, including under the desks. The person in this position frequently communicates with coworkers and customers who have inquiries about our business operations and the community we service; therefore, the person must be able to exchange accurate information. The employee must occasionally lift and/or move up to 10 pounds.

Schedule

Must be available to work flexible hours, evenings and Saturdays, every week throughout tax season. Meetings, trainings, and gatherings prior to tax season will be required, and most likely occur during the workday.

Non-Exempt Temporary

Pay for this position is \$30/hr. Average hours are 8 to 20 hours a week, depending on determined schedule.

Send Resumes To:

recruiting@unitedwayoc.org

Orange County United Way
18012 Mitchell South, Irvine, CA 92614
www.unitedwayoc.org