

Client Acceptance Advocate Volunteer

codeforamerica.org/taxvolunteers

The Program

GetCTC was launched in late 2021 as a do-it-yourself simplified filing tool to provide an accessible way for people with low or no income to directly apply for the expanded Child Tax Credit. In just a few months, over 275,000 returns were filed, bringing in over \$400,000,000 in refunds to individuals who could have otherwise missed out on this poverty-reducing credit. In 2022, we relaunched GetCTC for filers with low or no income to not only claim the remaining portion of the CTC, but also receive the third stimulus payment and the Earned Income Tax Credit. In 2023, as an efilng tool, GetCTC, will continue serving individuals and families with low or no income, the scope of which will be dependent upon IRS authorization.

Role

Client Acceptance Advocate volunteers assist clients who use our efilng tool by providing detailed guidance about the client's particular filing situation. Specifically, to determine the optimal outcome for each client, volunteers assess their tax filing circumstances, determine the various options available to maximize their eligibility for tax benefits and communicate specific instructions to the client via text and/or email. This role does not require IRS tax preparation certification.

Duties and responsibilities may expand based upon determined scope of GetCTC in 2023 and volunteer's corresponding strengths and availability.

Requirements

- Complete 8 hours of tax orientation and training (virtual)
- Pass IRS ethics exams (training provided)
- Work closely with staff and volunteers
- Strong written communication skills
- Superb customer service skills
- Extensive experience using online software
- Excellent data entry and general computer skills
- Assist with complementary tasks as needed

Bonus! Do you have other skills that we should know about? Here are a few things we think are great:

- Experience working remotely
- Training on Diversity, Equity, and Inclusion (DEI)
- Experience conducting community research
- Bilingual

To apply, please sign up for a virtual [Info Session](#).