

VITA Intake Screener Job Description

La Casa de Esperanza's Volunteer Income Tax Assistance (VITA) program helps provide **free** tax preparation for low to moderate income individuals and families ensuring they receive all the tax credits for which they're eligible. Many of these households desperately need their refunds to cover basic needs. The Intake-Screener role is the hub of our VITA program.

Roles:

Provide support to the Program Site Coordinator and volunteer tax preparers by ensuring each taxpayer has the necessary information required to complete his/her return.

Tasks:

- Greet all taxpayers visiting the site to create a pleasant atmosphere.
- Assist at reception desk.
- Ensure each taxpayer has brought the necessary information (e.g. current tax documents, Valid photo ID, SS-cards) from which a tax return can be completed.
- Assist the taxpayers with their mandatory Intake folder
- Review customer's information to determine the type of assistance they will need to complete their tax return.
- Maintain confidentiality of customer information.
- Attend new and/or refresher tax law training and certification as needed, including the use of electronic filing software.
- Assist in making copies of forms, documents, etc.
- Schedule and confirm tax appointments
- Assist in program outreach.
- Provide other assistance as needed.

Skills:

- Basic computer and office equipment knowledge
- Successfully pass a test at Basic level on required tax law knowledge.
(Advanced level if desired)
- Friendly, Dependable, Flexible and a Team-Player
- Strong communication and customer service skills is a must
- Must be dependable and able to work flexible hours.
- Volunteer a minimum of 3-4 hours per week from approximately Mid-January through Mid-April, or at a minimum Mid-January through the end of February.
- Bilingual is helpful, but not required