

VITA Intake Screener
La Casa de Esperanza
Volunteer Description

2 paid positions available for 2008-2009 tax season. Salary, \$9/hour.

Roles:

Provide support to the Volunteer Tax Preparers. Performs screening for all taxpayers that are requesting assistance at the site to identify what type of return and tax schedules each customer will need assistance with and to ensure the taxpayer has the necessary information required to complete his/her return. Intake screeners will also determine eligibility for BadgerCare Plus health insurance.

Tasks:

- Ensure all clients sign in or have an appointment.
- Greet all taxpayers visiting the site to create a pleasant atmosphere.
- Assist taxpayers with basic tax law questions.
- Survey customers to determine the type of assistance they will be needing and the tax forms that will be required to complete their tax return.
- Ensure the taxpayer has brought the necessary information (e.g. W-2, 1099's, last year's return) from which a tax return can be completed.
- Make copies of client social security cards and identification documents.
- Complete taxpayer information sheet for Volunteer Preparer's reference.
- Match customers to available tax preparers.
- Monitor site traffic to ensure that sufficient time is allowed for all taxpayers being checked in at the site to receive assistance.
- Refer customers with complex returns to a tax preparer.
- Screen clients to ensure that all households have information about BadgerCare Plus insurance; prescreen clients to determine if they might be eligible for BadgerCare Plus; make appointments for application if eligible.
- Maintain confidentiality of customer information.
- Assist volunteer tax assistors as needed.
- Ensure that adequate supply of key forms is available, making additional copies as needed.

Skills:

- Must be certified at a beginner tax certification level. Tax training and certification will be provided as needed.
- Willingness to volunteer a minimum of 2 to 4 hours per week between mid-January through April 15.
- Ability to deal with the public in a helpful supportive manner.
- Must be dependable and able to work flexible hours.

To Apply:

- Complete volunteer application form and submit to Elizabeth Torres, VITA Program Manager at etorres@lacasadeesperanza.org or mail to Elizabeth Torres, La Casa de Esperanza, 410 Arcadian Avenue, Waukesha, WI 53186. For more information, please contact Elizabeth Torres at 262-547-0887.