

VITA Appointment Scheduler

Job Description

La Casa de Esperanza's Volunteer Income Tax Assistance (VITA) program helps provide free tax preparation to low 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. In 2013 La Casa's VITA program was able to serve 1,677 clients and helped bring back over \$3.1 million in tax refunds to the community. Appointment setting is the foundation of our VITA Program.

Roles:

Using great customer service skills to set VITA appointments by collecting thorough information from our clients and inputting it into our database.

Tasks:

- Run the reception desk by answer phone calls and make tax appointments for clients
- Gather detailed information for each appointment.
- Data entry of various information into Excel
- Maintain confidentiality of client information.
- Provide other assistance as needed.

Skills:

- Must be able to communicate clearly and have a high level of customer service skills.
- Attention to details and strong organizational skills is a must
- Able to work with computers, Microsoft Office, Outlook, copiers, and fax machine.
- Willingness to be Friendly, Dependable, and a Team-Player.
- Must be reliable 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 of Mid-January through the end of February.
- Bilingual is helpful, but not necessary