

VITA Intake Screener 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 bring back over \$3.1 million in tax refunds to the community.

Roles:

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

Tasks:

- Assist at reception desk.
- Help taxpayers complete Intake form
- Ensure each taxpayer has brought the necessary information and documents required by the IRS
- Review customer's information to determine the type of assistance they will need to complete their tax return.
- Assist in making copies of proper ID's, forms, documents, etc.
- Maintain confidentiality of customer information.
- Complete Basic Certification

Skills:

- Basic computer and office equipment knowledge
- Friendly, Dependable, Flexible and a Team-Player
- Strong communication and customer service skills is a must
- 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