



## **Volunteer Income Tax Assistance Program Tax Intake Specialist Volunteer**

**Summary:** The Volunteer Income Tax Assistance (VITA) Tax Intake Specialist meets with clients virtually to coordinate the tax clinic check-in process, ensure participants have all necessary paperwork for their tax appointment, and make referrals to connect households with relevant community resources providing one-on-one follow-up when necessary.

### **Essential Duties and Responsibilities:**

- Screen and schedule interested participants according to tax needs.
- Complete intake paperwork, answer questions, and provide great customer service
- Have knowledge of public benefits and community resources.
- Assist clients with eligibility and enrollment for financial services, food support, medical coverage, and energy assistance.
- Work cooperatively with staff and other volunteers to ensure clients receive a quality customer service experience.
- Ability to coach clients using technology.
- Manage, within a virtual environment, the assigned scheduled hours and the use of digital tracking and communication tools.
- Other duties as assigned.

### **Qualifications/Requirements:**

- Must successfully pass a criminal background check and provide references.
- Abide by all CAP-HC confidentiality policies and procedures.
- Must be at least 18 years of age.
- High School diploma or GED equivalent is required.
- Must be comfortable interacting with people of diverse backgrounds, education, economic status, and culture.
- Desire to learn how to complete IRS and MN Income Tax forms (no experience required).
- Requires strong verbal and written communication.
- Proficient with technology and working with computers.
- Proficient in Microsoft Office Suite (Word, Excel), email, and internet use.
- Data entry or experience working with database and software applications.
- Fluency in English language (written and spoken). Bilingual in Hmong, Karen, Nepali, Somali, Spanish or another language desired
- Be willing to learn.

### **Training:**

- CAP-HC Volunteer training.
- Attend all tax-law training sessions and successfully attain IRS-tax law certification (training and coaching is provided to ensure success).
- 10-15 hours of IRS and Minnesota tax law training (provided online).

**Time Commitment:** A minimum of 4-hours per week between February 1- April 14, 2023

### **Benefits:**

- Knowledge that you are working as a team to ensure that CAP-HC clients tax returns are completed.
- Work experience in tax software, TaxSlayer.
- Free parking if needed.

**To Apply:** Please send your cover letter and resume to [taxassistance@caphennepin.org](mailto:taxassistance@caphennepin.org) or complete the [Volunteer Interest Form](#).

We can't do it without you! Thank you for being part of our team.