



Administrative & Customer Service Support Volunteer

ROLE SUMMARY

Provide general administrative support to CAP-HC staff, VITA Site Coordinator, and volunteers and provide exceptional customer service to Volunteer Income Tax Assistance (VITA) clients.

ROLE DESCRIPTION

- Manage incoming and outgoing phone calls and emails to provide positive experience and ensure client satisfaction.
- Listen carefully to understand client requests, resolve issues, and field complaints with patience, professionalism, and empathy.
- Assist participants with completing CAP-HC customer service satisfaction survey.
- Ensure clients know which documents they need to bring to their appointment, including valid photo identification, Social Security card(s), W-2, 1099, 1095, prior year tax return, etc.
- Explain the site's tax return preparation process to clients.
- Engage with other volunteers, staff, partners, and clients in a helpful and supportive manner.
- Maintain confidentiality of client information.
- Complete additional administrative duties as assigned by CAP-HC staff, VITA Site Coordinator, and volunteers.
- Attention to detail and the ability to work in a busy environment are necessities.
- Computer proficiency and experience using Excel is preferred.

TRAINING REQUIREMENTS

- New administrative & customer service support volunteers must complete the Volunteer Standards of Conduct (VSC) Training – Ethics
- Returning volunteers are encouraged to review the VSC Training
- All volunteers must complete the VSC certification