



## Position: Intake Specialist

December 2019 - May 2020



United Way  
of Greater Philadelphia  
and Southern New Jersey

**Reports to:** Site Manager & Director of Operations, Campaign for Working Families, Inc.

**Program:** The Campaign for Working Families, Inc. (CWF) facilitates expanded income security to low and moderate wage earners in the Philadelphia and Southern New Jersey regions by increasing their access to the Earned Income Tax Credit (EITC) and other federal credits, low cost financial services and products and public benefits. During the tax season, the Campaign runs a number of VITA (Volunteer Income Tax Assistance) tax sites throughout Philadelphia and Southern New Jersey, managed by paid contractors and supported by volunteer tax preparers that provide free tax preparation services for low and moderate income families and individuals.

**Purpose of Position:** **Serve as the point of entry at a free community tax site where you will greet customers, organize paperwork and folders and support other administrative tasks.** Intake Specialists are ultimately responsible for all aspects of the intake process and screening. Intake Specialist must maintain a system of organizing walk-in taxpayer's intake folders and reviewing them for completeness.

**Length of Appointment:** Part-Time Employee (up to 29 hours per week) positions from Mid-January to May 1, 2020. Training occurs December 2019 through January 2020. Candidates must be available for trainings and to work Saturdays and evenings as required during the tax season.

### Responsibilities:

#### CERTIFICATION

- Must complete the IRS Standards of Conduct training/exam.
- Must complete the IRS Intake/Interview and Quality Review training.

#### CUSTOMER SERVICE

- Arrive at the tax site 60 minutes prior to posted site opening time and begin intake at least 45 mins prior to site opening time.
- Ensure that taxpayer is eligible for VITA tax services. Assist in selecting Walk-in or Drop of tax return preparation.
- Implement uniform intake process that is effective but does not slow down the site flow.
- Ensure a warm, respectful and comfortable environment for the customer.

#### INTAKE PROCESS

- Ensure implementation of new intake process designed to: screen customers for tax site eligibility and documents necessary for tax preparation, collect demographic information, screen customers

for public benefit eligibility, and provide appropriate financial products in response to customer suitability.

- Implement intake process to ensure high customer participation.

**ADMINISTRATION**

- Participate in weekly conference calls and webinars.
- Participate in all training dates between October and January.
- Provide accurate customer logs each week as instructed to track success in linking customers to new services.

**Qualifications:**

- Ability to learn new things and master new concepts
- Reliable and punctual
- Comfortable in a chaotic and ever-changing environment
- Attention to detail
- Commitment to the Campaign's mission
- High level of organization
- Friendly and helpful.
- Customer service skills
- Excellent computer skills

**How to Apply:** Please send resume and cover letter to Michelle Arthur, [mcarroll@cwfphilly.org](mailto:mcarroll@cwfphilly.org)