

# JOB DESCRIPTION



Job Title:	<b>Client Intake Specialist</b>	Status: (E/NE)	Volunteer
Department/Program:	MABC-VITA	Reports to:	Site Coordinators
Location:	Various	Travel Required:	No
Grade:		Position Type:	Seasonal
Management: (Yes/No)	No	HR Contact:	

**Job Purpose:** Greet clients with respect and courtesy. Screen client information for eligibility and needed documents on a first come first served basis. Survey clients to determine the type of assistance needed and what tax forms that will be required to complete their tax forms. Ensure that clients complete a Client Intake/Interview Sheet and assist in completion if needed. Monitor site traffic to ensure that sufficient time is allowed for each signed-in taxpayer to receive assistance. Maintain confidentiality of client information. Report any problems that arise to the Site Coordinator.

**Essential Duties:** include the following. Other duties may be assigned.

1. Greet clients with respect and courtesy.
2. Develop a log to sign in clients needing assistance.
3. Photocopy pertinent information/documents needed for tax return preparation.
4. Screen client information for eligibility and needed documents on a first come first served basis.
5. Survey clients to determine the type of assistance needed and what tax forms that will be required to complete their tax forms.
6. Ensure that clients complete a Client Intake/Interview Sheet and assist in completion if needed.
7. Sign in taxpayers and indicate the level of complexity based on income level and support documentation.
8. Monitor site traffic to ensure that sufficient time is allowed for each signed-in taxpayer to receive assistance.
9. Refer clients with complex returns to a tax practitioner, but not a specific person or firm.
10. Maintain confidentiality of client information.
11. Retrieve data from a computer.
12. Report any problems that arise to the Site Coordinator.
13. Refer clients to other services being provided at the site.

**Skills/qualifications:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Must attend SDC’s free tax law-e-file training session and pass the advanced level certification of IRS Link & Learn Taxes. Intake Specialists will need to complete a criminal background check and drug test in order to be approved to work within the program. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Demonstrate the ability to effectively present information and respond to questions from managers, clients, customers, and the general public. Strong written and oral communication skills are required.

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**Experience/Education/Training/Certifications:** High school diploma or equivalent and two years of related experience including interviewing for the purpose of gathering and verifying pertinent information for the completion of forms. Have experience entering and retrieving information from computer terminals.

## Physical Demands:

- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The phrases “occasionally,” “regularly,” and “frequently” correspond to the following definitions: “Occasionally” means up to 1/3 of working time, “regularly” means between 1/3 and 2/3 of working time, and “frequently” means 2/3 and more working time.
- While performing the duties and responsibilities of this position, the employee is occasionally required to stand and walk. The incumbent will regularly sit, and will frequently talk and listen and use hands to finger, handle or touch. Specific vision requirements for this position include close vision and the ability to adjust focus. During the performance of his/her duties, the incumbent will regularly lift up to 25 pounds and occasionally up to 50 pounds.

## Work Environment:

- The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- The employee works regularly in an office environment where the noise level is moderate.
- May work some evenings or Saturday hours.

## Disclaimer:

The above statements are intended to describe the general nature and level of work being performed by volunteers for this position. They are not be construed as an exhaustive list of all responsibilities, duties, and skills required. **All volunteers are required to complete and submit with volunteer interest form a completed Background Information Disclosure form.**