

VITA 2012 POSITION DESCRIPTION – INTAKE COORDINATOR

What will I do?

The Intake Coordinator is the first point of contact for clients when they enter a VITA site. As the first point of contact, the Intake Coordinator should be customer focused and able to interact with diverse groups. The Intake Coordinator must also be well versed in the variety of services that are available for clients through the VITA program in addition to the free income tax assistance. No tax preparation training is required.

Following are some general Intake Coordinator responsibilities:

- Provides taxpayers with intake forms to complete and helps with completion of forms as necessary.
- Ensures that taxpayers have all necessary documents.
- Ensures the taxpayer qualifies for VITA assistance.
- Contacts the scheduled clients to confirm appointments.
- Manages flow of clients to tax preparers and waiting list if applicable.
- Informs clients about other services available through the United Way of North Central Florida and its partners.

What are the required qualifications?

- Basic tax law knowledge, but does not need to know how to prepare a tax return.
- Basic training (2-4 hours) – Filing requirements, EITC basics and other administrative issues.
- Knowledge of other promotions and services offered by United Way of North Central Florida and its partners.
- Strong interpersonal and communication skills.
- Strong organization and crowd management skills.
- Good attention to detail.
- Outgoing, confident in speaking with clients.