



# Campaign For Working Families, Inc.

## JOB DESCRIPTION

### EMPLOYEE INFORMATION

<b>Job Title:</b>	Intake Specialist	<b>Last Updated:</b>	November 2023
<b>Department:</b>	Tax Operations	<b>Primary Manager:</b>	Tax Operations Area Manager
<b>DOL Status:</b>	Part-Time/Seasonal	<b>FLSA Exemption:</b>	Exempt

### Overview Campaign For Working Families

Campaign For Working Families Inc., mission is to champion the financial well-being and economic mobility of individuals and families by leading programming and advocating for policies, initiatives, and support systems that ensure equitable opportunities and financial stability. CWF is driven by the belief that every individual and family deserve respect, dignity, and the tools/information to succeed, and CWF is committed to enacting positive change at both the policy and grassroots levels by fostering a culture of empathy, data-driven decision-making, and collective action. The following core values serve as a guiding framework for the Campaign for Working Families, helping to define its mission, goals, and actions in support of individuals and families throughout its communities:

1. **Equity and Inclusion:** We believe in a society where all individuals and families, regardless of their background, race, gender, or socioeconomic status, have equal opportunities and access to resources.
2. **Family-Centered Approach:** We prioritize policies and initiatives to support the well-being, stability, and growth of families, recognizing that strong families are the foundation of a thriving society.
3. **Collaboration and Partnerships:** We value collaboration with other organizations, governments, businesses, and individuals who share our commitment to the well-being of working families.
4. **Data-Driven Decision-Making:** We rely on evidence and data to inform our policies and initiatives, ensuring that our efforts are effective and impactful.
5. **Respect and Dignity:** We treat all individuals with respect and dignity, recognizing the inherent worth of every member of a working family, and striving for a society that upholds these values.

### Position Summary

The Campaign for Working Families seeks a dedicated and detail-oriented Tax Intake Specialist to serve as the first point of contact for CWF tax clients. As a Tax Intake Specialist, this individual will be responsible for performing initial screenings of clients to determine their eligibility for services, managing the accurate collection and processing of personal and financial documents, and entering client information into CWF's secure online database. The specialist will facilitate a smooth and organized intake process, maintaining confidentiality and compliance with IRS regulations and organizational policies.

### Role and Responsibilities

#### Intake and Interviewing:

- Conduct initial screening of taxpayers to determine eligibility for the tax site services offered by CWF.
- Review and verify all required tax documents and personal identification documents presented by taxpayers.
- Utilize specialized software to scan and securely upload taxpayer documents into CWF's online taxpayer database, ensuring a reliable electronic record.
- Interview taxpayers to obtain all necessary information and clarify any discrepancies or outstanding details required for accurate tax preparation.

**Data Entry:**

- Perform accurate data entry of personal information, financial data, and other relevant taxpayer details into CWF's online taxpayer database.
- Ensure the accuracy of all data entered, cross-referencing the source documents to mitigate errors and omissions.
- Update taxpayer records as needed to reflect any changes or additional information gathered during the tax preparation process.

**Customer Service:**

- Foster a welcoming, respectful, and comfortable environment for all taxpayers, contributing to a positive service experience.
- Address taxpayer questions with professionalism and empathy, providing clear information regarding the intake process and what to expect during tax preparation.
- Guide taxpayers through the intake process, setting a respectful and welcoming tone from the first point of contact.

**Compliance:**

- Uphold the highest standards of confidentiality regarding all taxpayer information and documentation handled during the intake process.
- Adhere to CWF's policies, as well as federal and state regulations governing the handling of sensitive taxpayer information.
- Participate in ongoing compliance training to remain informed of current best practices and legal requirements related to taxpayer data confidentiality.

**Documentation and Record-Keeping:**

- Maintain organized and secure records of all taxpayer interactions, including document intake, interviews, and any follow-up actions required.
- Ensure all physical documents are handled and stored securely, and all electronic records are protected according to CWF's data security protocols.

**Collaboration and Support:**

- Work closely with tax preparers and other staff to ensure a seamless transition from intake to tax preparation, providing all necessary documentation and information.
- Offer support and assistance to the tax preparation team by obtaining any additional documentation or clarification needed for accurate tax filing.

**Training and Development:**

- Participate in training sessions and workshops to continuously enhance skills relevant to the intake and interviewing process, data entry, customer service, and compliance.

**Quality Assurance:**

- Review intake procedures regularly to identify opportunities for process improvement and contribute to the development of best practices to enhance service quality and efficiency.

**Competencies, Knowledge, Skills and Abilities**

- Ability to take the required tax training and pass the basic tax certification exam.
- Must possess strong verbal and written communication skills.
- Ability to explain complex processes in a clear and understandable manner to individuals with diverse backgrounds and levels of financial literacy.
- Attention to detail to ensure accuracy in document review, data entry, and record-keeping.
- Ability to follow through on tasks to ensure complete and accurate information is captured and maintained.
- Strong organizational abilities to manage multiple tasks simultaneously and maintain accurate records.
- Proficiency in managing time effectively, especially during peak tax season, to meet deadlines and client needs.
- Excellent customer service skills to create a welcoming and supportive environment for taxpayers.
- Ability to build rapport with clients and handle sensitive situations with tact and empathy.
- Fast and accurate data entry skills, with a familiarity with database management and software applications relevant to tax intake processes.
- Ability to handle confidential and sensitive information.
- Competence and general proficiency with office technology and software including word processors, scanners, and email.
- Ability to identify and resolve issues efficiently and effectively, using judgment and decision-making skills to address taxpayer and process-related challenges.
- Flexibility to adapt to changing procedures, tax laws, and client situations with a positive and proactive attitude.
- Bilingual skills in languages relevant to the community served, such as Spanish or Mandarin, are highly beneficial.
- Ability to work under pressure in a fast-paced environment.
- A collaborative disposition to work as part of a team, contributing to the organization's mission and goals.

## Competencies, Knowledge, Skills and Abilities

- High school diploma or equivalent is required; associate or bachelor's degree in finance, accounting, business administration, or a related field is preferred.
- Prior experience in customer service, administration, or a related field, with exposure to financial services or tax preparation is preferred.
- Proficiency with tax software (e.g., TaxSlayer), databases, and Microsoft Office Suite (Word, Excel, Outlook).
- Strong typing and data entry skills with a high level of accuracy.
- Ability to accurately review and process complex tax-related information without error.
- Excellent verbal and written communication skills.
- Strong customer service skills and the ability to create a comfortable and respectful environment for taxpayers.
- A firm understanding of the importance of confidentiality and the ability to handle sensitive information with integrity.
- Excellent organizational skills with the capability to handle multiple tasks in a fast-paced environment.
- Empathetic and personable with the ability to relate to individuals from diverse backgrounds.
- Ability to adapt to new laws, procedures, and changes in technology.
- Bilingual proficiency is a significant plus.
- Basic understanding of IRS regulations and tax filing processes is beneficial.
- Willingness to undergo necessary tax law and software training to perform intake duties effectively.
- Ability to work effectively both independently and as part of a team.

## Other Specialties, Certifications, Physical Requirements, and Work Conditions

- Regular, predictable and punctual attendance is required.
- This position operates in an office setting or works from home and routinely uses standard office equipment such as computers, phones, photocopiers, scanners, filing cabinets and fax machines.
- Exertion of physical strength to lift, carry, push, pull, or otherwise move objects up to 10 pounds. Work involves sitting, walking, and standing is often necessary in carrying out job duties.
- Ability to learn new things and master new concept(s).
- Comfortable in a chaotic and ever-changing environment
- Attention to detail.
- Commitment to the Campaign for Working Families Mission

## Acknowledgment

I acknowledge that I have read and accepted this job description. I understand what is expected of me in this position, and I can perform the essential functions as outlined with or without reasonable accommodation. Furthermore, I understand the duties and responsibilities listed in this job are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position. If I have any questions about duties and responsibilities not specified in this job description that I am asked to perform, I should discuss them with my immediate supervisor or Human Resource representative.

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Employee Name (Please Print)

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Employee Signature

\_\_\_\_\_  
Date