

**United Way Escambia  
Position Description**

<b>Latest Revision Date:</b>	November 2017
<b>Incumbent/Candidate:</b>	New Position
<b>Position/Title:</b>	MyFreeTaxes Lead Support Center Specialist
<b>Reports to:</b>	Directly to the MyFreeTaxes Support Center Coordinator
<b>Pay Grade:</b>	<b>Hourly</b>
<b>Exempt/Non-exempt:</b>	Non-Exempt

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## **What is a MyFreetaxes Lead Specialist?**

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MyFreeTaxes Lead Specialist will provide phone support to clients using the MyFreeTaxes.com website in an effort to help volunteers, as well as site coordinators and other reps from VITA/TCE sites nationwide, troubleshoot and navigate the MyFreeTaxes website.

The MyFreeTaxes Lead Specialist will assess and troubleshoot tax questions from MyFreeTaxes.com users to ensure that clients are able to successfully complete customer tax returns on the MyFreeTaxes.com website. The inquiries will come via dedicated phone line, chat and email. It is the responsibility of the staff member to answer all questions within the highest level of customer service possible, aiming for first-call resolution wherever possible, and following all 2-1-1 Escambia policies and procedures for proper call handling and quality assurance measures. The MyFreeTaxes Lead Specialist will also monitor customer interactions and provide constructive feedback in support of the MyFreeTaxes Specialists, and handle escalated calls which require more research.

The Lead Specialist participates in continuing education as directed by the Support Center Coordinator, and must maintain at minimum an advanced level LinkandLearn VITA Certification.

The Lead Specialist should have a professional and clear speaking voice and be able to relate comfortably with clients, regardless of race, ethnic or financial status.

### **Primary Duties:**

- Answer general and complex inbound inquiries related to the MyFreeTaxes website and navigation of the site.
- Maintain confidentiality of personal information obtained from customers.
- Provide tax preparation override codes to customers when necessary.
- Capture required and appropriate demographics of customers as outlined in training materials.
- Perform outbound follow up calls as requested by United Way Worldwide.
- Utilize a Language Line Service to support multiple languages.
- Ensure that all calls and emails are answered or returned within the timeframe set by United Way Worldwide.
- Participate in all required continuing education training, to remain current on all changing tax law.
- Provide federal tax preparation advice within the guidelines of the VITA (Volunteer Income Tax Assistance) training received as it pertains to customers using MyFreeTaxes website.
- Log all calls and outcomes into the MyFreeTaxes custom VisionLink database portal.
- Handle all state-specific tax questions and/or refer to H&R Block as appropriate.
- Assist with the developing of training material and delivery for MyFreeTaxes Specialists.
- Ensure successful service delivery by continuously monitoring and

improving both personal and team productivity, quality assurance scores, and efficiencies.

- Participate in weekly call calibrations and contribute feedback while representing United Way of Escambia
- Keep all activities in line with the core values and contribute to the positive culture of United Way Escambia
- Assist with other projects as assigned.

#### **Other Information**

- Position is Monday-Friday between the hours of 9am and 9pm and is based upon a 40 hour work week, based on full time temporary employment status. Saturday work will be required.
- The Lead Support Center Specialist is an hourly position and any overtime is subject to approval of the Office Manager.
- Offer suggestions for improvement and growth in an effective manner.
- Communicate relevant information with staff and participate in staff meetings.
- Prepare program reports as needed.

#### **Qualifications:**

- 1-2 years of Technical Assistance preferred.
- 1-2 years of call center experience preferred.
- 1-2 years Supervisory, Management and/or Quality Assurance Experience preferred.
- 3-4 years of Tax Preparation Experience Preferred.
- Ability to deal effectively with difficult situations.
- Excellent verbal, written and interpersonal communication skills.
- High level of proficiency in web-based systems, real-time communication systems (i.e.: chat), Microsoft Office
- The desire to seek learning opportunities to promote growth, professional and personal development.
- Bilingual English/Spanish is highly desirable.
- An in-depth understanding of the impact of society on individuals is preferred.
- Complete and pass Advanced Level, Health Savings Accounts trainings LinkandLearn VITA Certification training online.
- Ability to work collaboratively with a wide range of people and personalities
- Flexible, trustworthy, and creative; maintains a supportive and cheerful attitude
- Maintains a professional manner in order to work with the volunteers, staff and community
- Must be able to pass a level two background check.

#### **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.

- While performing the duties of this job the employee is regularly required to walk, sit and stand; use hands to finger manipulation, handle, feel, reach with arms and hands, and talk or hear.
- The employee may be required to lift up to 25 pounds.
- The vision requirements include close, distance, peripheral and depth perception.

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