

**United Way Escambia  
Position Description**

<b>Latest Revision Date:</b>	November 2017
<b>Incumbent/Candidate:</b>	New Position
<b>Position/Title:</b>	MyFreeTaxes 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 Support Center Specialist?**

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MyFreeTaxes Specialists will provide phone support to customers using the MyFreeTaxes.com website in an effort to help residents nationwide become more self-sufficient in filing their own taxes.

The MyFreeTaxes Specialist will assess and troubleshoot tax questions from MyFreeTaxes.com users, to ensure that clients are able to successfully complete their 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.

#### **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.
- 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 20 hour work week, based on part time temporary employment status. Saturday work will be required.
- The 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.

**Qualifications:**

- 1-2 years of Technical Assistance preferred.
- 1-2 years of call center 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.
- 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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