

Tax Site Assistant – Position Description

The tax site assistant (TSS) provides customer support and service for taxpayers receiving services from Tri-CAP. Working closely with the tax site manager, the TSS keeps the multi-step process smooth running. The TSS plays an integral role to ensure a positive experience for Tri-CAP customers. To apply, please sign up via our website, www.tricap.org. You may also contact the Tax Program Manager, at tricaptaxes@tricap.org or 320-251-1612

Role and responsibilities:

- Initiate the customer sign-in process, ensuring that customers meet the basic eligibility requirements for services
- Answer customer questions and act as a navigator through the multi-step process
- Assist in the overall operation and flow of the tax clinic
- Go over completed tax return with customers and secure necessary signatures
- Provide the initial and final “Tri-CAP friendly face” for customers

Skills required:

- Passion for connecting with people
- Strong leadership skills and ability to work independently
- Ability to relay complex information in a clear and direct manner
- Ability to multi task in a sometimes chaotic environment
- Enjoy working in a diverse ethnic and socio-economic environment
- No previous tax experience is necessary

Commitment and timeline:

January – April 15

- Tax Site training 2 to 4 hours
- Software training 1 to 2 hours
- End of January – April Volunteer at least once a week for 4 hours

Locations:

Tri-CAP currently operates sites in our service area of Stearns, Benton and Sherburne counties. Volunteers select a site that is convenient to work at and best works with their schedule.