



*Helping People. Changing Lives.*

Tax Site Assistant	Family Resources
Reports To Tax Site Coordinator	Approved Date

<b>Overview:</b>
The Tax Site Assistant (TSAS) provides customer support for taxpayers receiving services from Tri-CAP. Working closely with the Tax Site Coordinator, the TSA keeps the multi-step process running smoothly. The TSA plays an integral role to ensure a positive experience for Tri-CAP customers.
<b>Service Impact:</b>
<ul style="list-style-type: none"> <li>• Tri-CAP Volunteer Income Tax Program (VITA) serves individuals grossing &lt; \$35,000 and families &lt; \$55,000 per year.</li> <li>• Classroom and online training is provided to Volunteers.</li> <li>• Returns are efiled for quick receipt of refunds.</li> <li>• We offer free walk in preparation services from the end of January through tax day (mid April) at locations in St. Cloud, Cold Spring, Foley, Waite Park, and Elk River.</li> <li>• Appointments are scheduled at the Tri-CAP office May through August for federal, state, and property tax/renters rebates.</li> <li>• Referrals are also provided for basic needs services and financial education and financial stability opportunities.</li> </ul>

**Key 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

**Time Commitment:**

January – April

- 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

**Qualifications:**

- 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



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**Physical Demands:**

- A combination of periods of sitting or standing.
- Able to lift or carry boxes/tubs of supplies up to 20 lbs.

**Work Environment:**

- Low to moderate noise levels.
- No extreme temperatures.

**Locations:** St. Cloud, Elk River, Cold Spring, Foley, and Waite Park

Benefits to Volunteering
<ul style="list-style-type: none"> <li>• Gratifying volunteer work that allows you to develop new skills and gain valuable experience, working with diverse customers, volunteers and staff.</li> <li>• Improve your community by helping hardworking families increase their income, thus their livelihood.</li> <li>• Build your resume; an excellent opportunity for students and jobseekers to demonstrate experience to employers.</li> </ul>

*This description describes the general nature and work expected of an individual assigned to this position. All requirements are subject to possible modification to reasonably accommodate individuals with a disability*

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Volunteer Acknowledgement Date

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Supervisor Signature Date