**VITA APPOINTMENT AND SUPPORT SPECIALIST – FULL TIME SEASONAL**

**Schedule:** Full Time – Seasonal - November 30, 2020 through April 30, 2021  
(Appointment Specialists will not work December 20, 2020 through January 4, 2021)

**POSITION DESCRIPTION**

**Who We Are**
Greenville County continues to draw national attention as a popular destination for visitors and a magnet for new development. But, even with this success, many experience a different Greenville. Right now, people are living in poverty. As the largest poverty-fighting organization in South Carolina, United Way of Greenville County’s unique ability to take on challenges like affordable housing, education, job training, transportation and other complex community issues—all at the same time—is unmatched.

**What We Do**
We mobilize donors and volunteers and convene partner agencies, corporations and community leaders to make broad, systemic change like no other organization can on its own.

United Way values the abilities and perspectives that make each person who they are, empowering our employees to reach higher, think differently, act innovatively, and work collaboratively. People who work here provide the energy, expertise and creativity that is critical to creating the lasting change our community needs—and the opportunities to succeed that everyone deserves.

**Vision:** A Greenville County where all people have access to the opportunities to achieve their full potential.

**Mission:** We mobilize people and resources to improve lives, strengthen the community, and advance equity for the benefit of all.

**Values:** We constantly challenge ourselves to reach higher, think differently, act innovatively, and work collaboratively to build a stronger Greenville County for all.

- **Results:** We set and exceed measurable financial and program goals that positively impact the community we serve.
- **Excellence:** We strive to always seek new and better ways to achieve our individual and shared goals, consistently delivering results at the highest levels.
- **Accountability:** We take ownership and responsibility for the unique role each of us has in achieving our vision of a stronger Greenville County for all.
- **Collaboration:** We leverage the power created by bringing diverse groups together, recognizing that unique ideas and perspectives are critical to solving shared community challenges.
- **Honesty/Openness:** We operate with the highest integrity and respect, embracing transparency, truthfulness and open dialogue in every aspect of our work.
POSITION SUMMARY: VITA Appointment and Support Specialist

Sponsored by the Internal Revenue Service (IRS), the Volunteer Income Tax Assistance (VITA) program provides free income tax preparation assistance to individuals and families with a household income of approximately $60,000 a year or less. VITA works to ensure everyone in the community receives all the tax credits and deductions for which they are eligible, with the goal being to help more individuals and families achieve greater financial stability through free tax preparation.

LENGTH OF COMMITMENT
Candidates will need to be available to begin training on November 30, 2020 and work through April 30th, 2021.

Schedule will consist of full-time hours, with the exception of reduced hours (25-30 hours) during the week of December 14th. Saturday and evening hours may be required during the tax season. Candidates will be hired for a specific schedule and will be required to work those scheduled hours for the duration of their commitment.

ESSENTIAL RESPONSIBILITIES
The VITA Appointment Specialist is responsible for managing incoming calls and scheduling taxpayers at VITA sites across Upstate South Carolina. The position requires the use of computer equipment and software, professional management and interactions with the general public, volunteers, and United Way staff and partners. Responsibilities include, but not limited to:

- Manage large amounts of inbound and outbound calls in timely manner to schedule appointments at various sites that best fit the caller’s needs.
- Guide callers through self-assisted tax filing software including navigating software, troubleshooting technical issues, referring to IRS and other tax-related resources, and answering tax-related questions.
- Oversee omni-channel support (phone, chat, email, etc.).
- Receive and resolve FSA inquiries and tax law questions received by other call center specialists.
- Follow communication “scripts” when handling different topics.
- Inform callers by explaining procedures; answering questions; providing information.
- Ensure accurate information is recorded and communicated to the caller regarding site location, specific needs, and documents required.
- Enter caller specific information and notes into appointment software which providing excellent and consistent customer service.
- Review appointments set by callers using the self-scheduling feature of the software.
- Conduct follow up calls to confirm appointments previously scheduled.
- Refers to IRS publications to answer tax questions.
- Update status of appointments as necessary.
- Train other Call Center Specialists on Volunteer Standards of Conduct, and Intake Interview & Quality Review (Dependent upon candidate possessing past VITA experience).

ADDITIONAL RESPONSIBILITIES:
- Take all necessary and/or required certification exams using the Link & Learn Certification website and pass with a score of 80% or higher. This includes the Volunteer Standards of Conduct exam and the Intake/Interview & Quality Review exam, and Advanced Tax law.
- Assist with tax preparation as needed.
- Assist with Intake/Greeter responsibilities at site locations.
- Communication of appointment schedule with Site Coordinators as needed.
- Perform other duties as requested or assigned.
GENERAL PHYSICAL REQUIREMENTS:

- **Sedentary Work:** Employee is required to exert up to 20 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects. Sedentary work involves sitting most of the time. Walking and standing are required only occasionally, and all other sedentary criteria are met.

**Required Minimum Education and Experience**

- Prior experience with the VITA program.
- High school diploma or GED
- Exceptional customer service, active listening, and verbal and written communication skills, professional phone voice.
- Ability to ask prying questions and diffuse tense situations.
- Strong time management and decision-making skills.
- Any combination of education and experience required to perform the Essential Job Functions.

**Preferred Education and Experience**

- Bilingual preferred
- Three years’ experience as receptionist in busy front office
- Proficiency with computers, especially with CRM software, and strong typing skills
- Fluency in multiple languages may be desired
- Proficiency in MS Word and MS Excel software applications

**Compensation**

- The hourly rate for this position is between $16 and $17 per an hour depending on experience. There are no benefits offered for this temporary assignment.

**HOW TO APPLY**

Submit your resume and cover letter to talent@unitedwaygc.org with “Appointment Support Specialist Position” in the subject line.

*United Way of Greenville is an equal opportunity employer and value diversity. All employment is decided on the basis of qualifications, merit and business need.*

This is not a contract. No information in this document will alter the At-Will Employment Relationship.