

# **United Way of Passaic County Financial Empowerment Zone Intern Screener/Greeter Position Description**

## **Purpose of Position:**

To orient people to the tax filing and benefits screening process and create a welcoming atmosphere at **United Way of Passaic County's** Financial Empowerment Zone located at Paterson Technology Center.

## **Responsibilities as an Intern Screener:**

- Greet all taxpayers visiting the site to create a pleasant atmosphere.
- Answer phones and make appointments for tax preparation and benefits screening.
- Guide taxpayers through the intake process, screen for eligibility and complete all relevant documents.
- Survey taxpayers to determine the type of assistance they will be needing and the tax forms that will be required to complete their tax return.
- Survey taxpayers to determine the type of benefits assistance they may want or need and recommend setting up an appointment with benefits specialist.
- Complete a check sheet to sign in taxpayers needing assistance.
- Ensure that taxpayer has brought the necessary information (e.g. W-2, 1099's, last year's return) from which a tax return can be completed.
- Offer customer the ability to open a free bank account with onsite banking partner (if available).
- Assist Site Manager with administrative tasks such as filings and mailings.
- Complete folder label for Volunteer Tax Assistor's reference.
- Monitor site traffic to ensure that sufficient time is allowed for all taxpayers being checked-in at the site to receive assistance.
- Provide general assistance to site customers.
- Provide translation to Spanish speaking clients working with English speaking preparers or benefits specialists.

## **Qualifications:**

- Customer Service skills
- Basic computer skills
- High level of organizational skills
- Bilingual would be most helpful

## **Training Required:**

- New Interns – 4 Hours

## **Time Commitment:**

The hours of the FEZ will be on Monday and Wednesday from 1-5pm and on Fridays from 11am-4 pm with hours running later if clients remain after hours. There may be optional openings on one or two Saturdays if the need is great. Time will also be required in late January or early February to review procedures with the site coordinator. For most intern Screener/Greeters training will be 4 hours. Intern Screener/Greeters generally commit to one or two 4 hours shifts each week during the tax season (after training) during the period of February through April 15. The exact intern hours required depends on specific responsibilities, number of other Screener/Greeters assigned to the FEZ site and volume of traffic.

Please forward resumes to Leslie Schlesinger [leslies@unitedwaypassaic.org](mailto:leslies@unitedwaypassaic.org) or call 973-279-8900 X205 with any questions.

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