

JOB ANNOUNCEMENT

Title: **Drop Off Manager**
Department: Asset Building Programs
Supervised by: Tax Site Manager
Duration & Hours: January 20 to April 16
Hours and days will vary by tax site
Locations: Elgin
Classification: Seasonal; temporary
Date: December

ORGANIZATIONAL SUMMARY:

The Center for Economic Progress (CEP) envisions an America of shared prosperity, where all working families can access the financial opportunities they need to succeed. CEP helps low-income, working families as a trusted provider of tax and financial services. Everything we do, from direct service to informing public policy, improves the financial stability of those we serve. Refer to www.economicprogress.org for more information about CEP's programs.

SUMMARY:

The Drop Off Manager is responsible for ensuring the accurate filing of electronic tax returns prepared by remote volunteer tax preparers at a community-based tax site operated by the Center for Economic Progress (CEP). The Drop Off Manager screens clients, prepares client files, submits requisite forms and documentation for tax preparation at remote tax site. The Drop Off manager will also support the post-tax preparation process including obtaining signatures, electronically transmitting returns, filing and distributing applicable documents. This position provides additional assistance to tax site as directed by the site manager.

RESPONSIBILITIES

Outreach and Preparation

50%

- Provide enthusiastic outreach to all taxpayers engaging them around the drop-off service as a convenient alternative to longer wait times and site capacity.

- Screen clients based on criteria to ensure return is appropriate for drop-off service
- Scan client tax documents to Google Drive and send to remote tax site.
- Schedule clients to return for a one-week turnaround to review prepared return and provide signature for electronic transmittal.
- Promptly and accurately transmit e-filed tax returns
- Promptly resolve rejected returns, according to CEP guidelines and procedures
- Work with lead drop off manager to reduce errors that trigger e-file rejections working with the other tax site managers to engage clients and create efficiencies in the client flow

Operational Support

30%

- Work closely with volunteer tax site specialists at each community tax site to ensure smooth client flow and to maximize drop off services at each location.
- Address client questions related to prepared returns. Adjust inconsistencies if necessary and follow through with site manager to ensure prompt resolution of service problems
- Follow mandatory procedures as outlined in training, the operational manual, and communication from CEP staff
- Sort printed paperwork and assemble in proper order using provided checklists
- Obtain required client signatures.
- Ensure client has appropriate copies of documents.
- Assemble and prepare client folder for final processing by site management staff.

Customer Service

(15%)

- Ensure clients and volunteers are treated fairly and professionally, with dignity, courtesy and respect
- Protect and maintain confidentiality of client information
- Ensure compliance with IRS guidelines regarding discrimination
- Apply tax law with integrity and fairness to all clients, ensuring an accurate return is filed and the client leaves with a positive experience

Ethics

(5%)

- Ensure adherence to the standards of conduct outlined in Form 13615-C, Volunteer Agreement, by all site staff and volunteers.
- Apply the values and mission of CEP in all aspects of site management
- Promptly identify and address ethical lapses in accordance with CEP and IRS guidelines.

QUALIFICATIONS

Job Experience: Minimum of two years of general office experience working with computers, high-capacity scanners and printers. Experience preparing income tax returns with tax software preferred. Previous work experience with CEP or other VITA program strongly preferred. Experience working with a diverse population of clients and/or volunteers in a customer service environment helpful.

Demonstrated Competencies: Works well with a diverse population of clients and volunteers. Works well in a fast-paced environment with multiple priorities. Able to adapt to new technology and new software products. Possesses a supportive and professional manner.

Specialized Skills: Demonstrates superior customer service skills and strong general office computer skills. Strong preference for individuals with knowledge of professional tax preparation software. Ability to speak a specific second language may be required for employment at some locations.

All Site staff are required to attend and complete training as determined by CEP, and to successfully complete IRS' certification exam

WORK ENVIRONMENT

- This position operates in partner host-site locations that may not necessarily be fully accessible.
- This role routinely uses standard office equipment such as computers, phones, photocopiers, scanners, filing cabinets, and fax machines.
- While performing the duties of this job, the employee is regularly required to talk or hear.
- The employee frequently is required to stand; walk; use hands to finger, handle or feel; and reach with hands and arms. The employee must frequently lift and/or move objects up to 50 pounds.
- This position will require working weekends and evenings.
- Regular travel to off-site locations in the Chicago metro area is required. Occasionally, some out-of-the-area travel may be expected.
- Workplace is a smoke- and drug-free environment.

- Decisions and criteria governing the employment relationship with all employees are made in a non- discriminatory manner, without regard to race, ethnicity, creed, religion, color, sex, sexual orientation, gender identity or expression, age, national origin, citizenship status, military service and/or marital status, order of protection status, handicap, disability, or any other factor determined to be unlawful by federal, state, or local statutes.

COMPENSATION

- Hourly pay ranges from \$14-\$16, commensurate with experience.
- Payroll is operated through Randstad Inc.

TO APPLY

- Submit cover letter and resume to Udodi Okoh, uokoh@economicprogress.org
- Please write your name (Last, First) in the re: line of your e---mail.
- Incomplete applications will not be accepted.
- Candidates will be considered immediately and the position begins in early January.