

LADDER UP

2021-2022 Bilingual Operations Support Specialist

Organizational Overview

Ladder Up is an entrepreneurial, Chicago-based nonprofit dedicated to providing free financial services to hardworking low-income families and individuals.

Through free tax return preparation, college financial aid application assistance, financial education, and legal representation, Ladder Up helps its clients access the resources they need to move up the economic ladder. The organization offers three free programs to Chicago-area clients:

- Tax Assistance Program (TAP): By training and deploying 1,000+ volunteers, Ladder Up offers free tax return preparation at more than 25 Chicagoland tax sites
- Financial Capability Program
 - Financial aid: Ladder Up helps low-income, minority, and first-generation students access financial aid for higher education
 - Financial education: Ladder Up provides one-on-one financial coaching to individuals and on-site financial education workshops for partner organizations
- Tax Clinic: Ladder Up offers free legal representation to low-income taxpayers facing tax controversies

Position Description and Responsibilities:

To assist the Tax Operations and Customer Service teams, Ladder Up seeks highly organized and self-motivated individual to serve in the role of full-time TAP Operations Specialist through the end of the 2022 filing season. The Operations Specialist will be responsible for providing customer service support for administrative, e-file follow-up, and IT support. This individual will have the following primary responsibilities but not limited:

Administrative and Customer Service Support (30%)

- Protect and maintain confidentiality of client information
- Answer incoming calls, respond to client, and volunteer inquiries, or direct calls to staff members as needed
- Help clients set up, reschedule, or cancel appointments
- Check and return hotline calls to answer client questions regarding tax site services, eligibility, and required documents
- Review and provide feedback on the content of TAP client surveys, client mailings, and other client facing materials, as needed
- Answer ITIN hotline calls and schedule appointments when needed
- Learn to use Ladder Up's scheduling and tax software
- Provide general support to other office staff as needed

IT and Operations Support (70%)

- Review client returns for common e-file transmission and rejection errors and resolve in a timely manner
- Follow-up with clients on tax return issues and missing information.
- Create paper file packets as needed for rejected returns

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- Create and update shared spreadsheets with large numbers of figures and data without mistakes
- Verify data by comparing it to source documents
- Assist with data entry related to tax program clients as needed
- Perform regular backups to ensure data preservation
- Assist with inventory and maintenance of office supplies and IT equipment
- Assist the TAP Operations Manager with tax software updates
- Assist the TAP Operations Manager with the configuration process and imaging of TAP tax site computers
- Learn to use Ladder Up's tax software (TaxSlayer) to prepare and review client tax returns as needed

As part of the hiring and on-boarding process, all successful candidates must complete the IRS Volunteer Income Tax Assistance (VITA) certification at the Advanced Level. Training is provided!

Position Qualifications:

- Spanish required
- Customer service experience
- Excellent oral and written communication skills
- Ability to communicate effectively and respectfully with diverse populations
- Flexibility and adaptability
- High level of motivation and interest in learning new skills
- Proficiency in Microsoft Office applications
- Experience submitting and resolving rejection issues for e-filed tax returns in TaxSlayer a plus but not required
- High level of organization and attention to detail
- Ability to effectively acknowledge and address client complaints and issues
- Quick learner who can work well in new situations or under pressure

To Apply:

This is a full-time, exempt position that is anticipated to end April 30, 2022, at the end of the 2022 filing season.

Interested candidates for the 2022 tax season should send a resume, preferably between November 1, 2021 – December 1, 2022, to:

Greg Williams
gwilliams@goladderup.org
Tax Assistance Program, Operations Manager

For more information about Ladder Up, please visit www.goladderup.org