

Volunteer Tax Advice Case Worker.

What we do.

TaxAid supports people who need help understanding their tax, untangling the tax problems that threaten their financial stability. We highlight the needs of our beneficiaries to those responsible for making the decisions that affect them and campaign to simplify the systems that baffle.

We're working towards a world where tax is easier for people to face, and no one is left to navigate it alone.

How do we do this.

Through our helpline, we listen, understand, and provide a solution tailored to individual circumstances. No matter how big or small the issues are, our approach is the same for everyone.

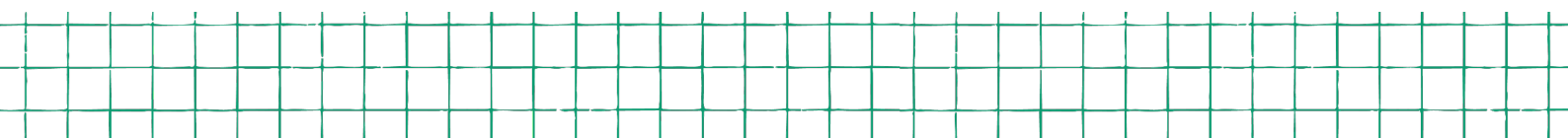
We know tax can be complicated, but we're here to make it less confusing. We give clarity and practical support to help people understand tax, both through our one-to-one support and our online information and guides. We campaign to simplify the systems that baffle and take the issues that matter to the people who decide how tax works.

We keep on top of a changing world and improve how we engage people who have different needs – making sure no one is left to face tax problems alone.

How you will help.

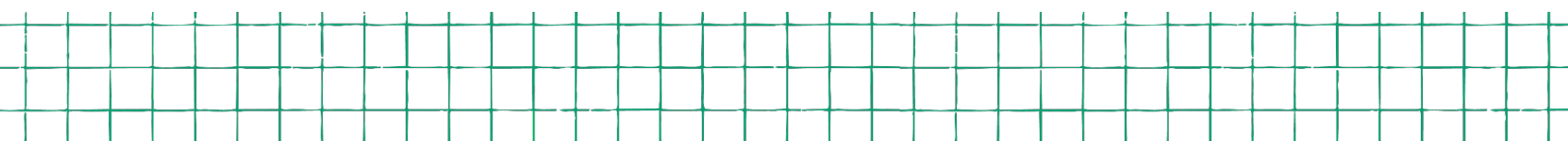
Volunteer Case Workers support people by managing and resolving individual tax cases that require ongoing help beyond an initial helpline call. These are cases where the person is unable to resolve their tax issue independently and needs additional support.

As a Case Worker, you will use your tax knowledge and professional experience to help people navigate complex tax issues, liaise with HMRC, and work towards a fair and sustainable resolution.



Volunteer Case Workers are responsible for their allocated casework with supervision and support from TaxAid colleagues. This will include:

- Reviewing the case record, including notes from the initial helpline call or meeting, to understand the beneficiary's circumstances and the tax issues involved.
- Assessing what further information or action is required and plan the steps required to resolve the case.
- Recording all case activity accurately and promptly using TaxAid's casework management database; Salesforce.
- Maintaining clear, accurate, and up-to-date case records in a timely manner and in line with TaxAid procedures.
- Representing TaxAid to people needing our support and external parties; ensuring clear and respectful communication at all times.
- Ensuring that people are kept informed of the progress of their case.
- Managing correspondence with HMRC and other relevant parties until the case is resolved.
- Ensuring that you remain up to date by completing TaxAid volunteer training and attending at least two quarterly volunteer workshops per year.



What you bring.

We are looking for volunteers who are able to demonstrate the following:

- A CTA, ATT, or equivalent tax qualification, or relevant experience.
- Good knowledge of HMRC practice and procedures, particularly in personal tax, self-employment, and tax debt.
- Strong written and verbal communication skills, with the ability to explain complex tax issues clearly.
- A professional and empathetic approach when working with people from a wide range of backgrounds.
- An understanding of and ability to work within policies and procedures, including data protection regulations and safeguarding.
- Confidence using IT systems, including databases, email, and online tools.
- Willingness to complete an expected minimum of 3.5 hours volunteering per month, with the understanding that some cases may require more time to complete.
- We ask that you are able to volunteer for a minimum of six months.

What we offer.

All volunteers receive a full induction and role-specific training, including how to use relevant databases and IT systems.

Ongoing guidance through.

- Quarterly online Topical Tax Training sessions.
- Access to TaxAid resources guidance materials through our dedicated volunteering webpage.
- Support from our teams on the phone or via email.
- Reasonable expenses incurred during your volunteering

