RECEPTION
Role & Responsibilities

1. Welcome people as they enter the building.

2. Make sure everyone signs in with name and phone #.

3. Explain filing procedure.

4. Copy client's driver's license, SS cards for client and all dependents, bank account # if using direct deposit. Give copies to client.

5. Make sure Intake and Tax Preparers see people in the order they signed in.

6. On busy days: when there will be a long wait, offer people the opportunity to sign in and come back later. Give them the phone number to call for updates.

7. Answer phone at front desk and provide information when possible.

8. If daily sign-in capacity has been reached, explain to late arrivals that they won't be able to receive assistance today, and give them a copy of future filing dates and sites.

9. Make sure Financial Literacy video is playing and brochures are available.

10. Above all, be friendly and helpful.

INTAKE
Role & Responsibilities

1. Ask reception for name of next client on sign-in list.

2. Welcome clients and help them feel at ease.

3. Before beginning intake interviews, ask client if they understand process or have any questions.

4. Fill in data on intake sheet and assess whether client has all paperwork necessary to complete filing process.

5. When we have bankers on site: ask clients who don't have a bank account if they would like to open one in order to get their refund direct deposited. If yes, take them to next available banker once interview complete.

6. Ask client to sign intake sheet and explain that all client paperwork is kept only until the end of filing season and stored in a secure location. Attach photocopies of license and SS cards to intake sheet.

7. When interview is complete, give all paperwork back to client and walk them back to reception area to wait for next available tax preparer.

8. Above all, be friendly and helpful.

***If a client has unique needs (i.e. interpreter), consult with site coordinator. If you feel client doesn't qualify for site service (i.e. complicated return, high income), consult with site coordinator.*

TAX PREPARER
Role & Responsibilities

1. When you are ready for a client, go to reception door and ask receptionist for the next name on the list; welcome client and invite them to your station.

2. Briefly review intake sheet with client before beginning a new return.

3. Ask Site Specialists for help when you have tax questions. Be discreet and keep client's comfort and security in mind at all times.

4. Run software diagnostics before printing return. Make corrections if necessary.

5. Print return and have a Quality Control volunteer review. Make corrections as necessary.

6. Make sure client signs appropriate forms; give client complete copy and keep appropriate forms for site use. Keep Intake form with site copies.

7. When client owes money, give them labeled envelopes.

8. Make sure client understands e-filing process.

9. Thank client and show them to the exit.

10. Fill in client information on station log sheet before take next client.

11. Above all, be friendly and helpful.

***If you cannot complete a client return for any reason (incomplete information, client chooses not to file, etc.), give client all paperwork. Only keep Intake form, and write Incomplete on the top. The only situation where we keep client paperwork is when we are waiting on a signature for a jointly filed return. Client should take home forms to be signed and return them to the site before the return is e-filed.*

***If you have concerns about a client's return (i.e. fraud), consult privately with a Site Specialist.*

*** After March 1: when amending a client return, be sure to print a copy of the original return that was e-filed before amending.*

QUALITY CONTROL
Role & Responsibilities

1. When called to check a return: Greet client and explain your role.

2. Compare printed return to Intake form and other client paperwork (i.e. W-2s, SS statements).

3. Look for math errors, transposed numbers and incomplete information or forms.

4. Refer to QC "cheat" sheet to make sure all appropriate information has been captured correctly.

5. Make any corrections in pencil on printed return and discreetly show Preparer what corrections need to be made on the computer.

6. Once return has been checked, initial station log sheet.

7. Above all, be friendly and helpful.