Loyola VITA Volunteer Manual

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Scheduling

Scheduling Form

Please use our scheduling form (sent through email earlier in the semester) to let us know what days you prefer to work and any conflicts you may have throughout the semester. If you would like to revise or resubmit, please complete our scheduling revision form.

Microsoft Teams (Shifts)

To access the shifts you've been scheduled for, please download the Microsoft Teams app, join our VITA team, and then navigate to the Shifts section within Teams. Please use our Microsoft Shifts Tutorial for guidance.

Swapping Shifts

If you're ever unable to show up for your shift, please offer your shift up on teams or swap it with another preparer of your training level. This should be done as soon as you are aware of a conflict and never later than 3pm on the day of your shift (for Saturdays, 3pm the day *before* your shift). You may utilize our group chat on Teams to find coverage.

Motorpool Information

Pickup Locations

In front of Newman Towers and the Loyola/Notre Dame Library

Pickup Times

On Tuesdays & Thursdays, pick up time starts at **5:20 p.m**.

On Saturdays, pick up time starts at **8:20 a.m**.

Motor pool will run until the last person is picked up and on time.

Loyola Shuttle

Additionally, on Tuesdays and Thursdays, the Loyola Shuttle will travel between the library to the Loyola Clinical Center from **5 p.m. - 9:30 p.m**.

Arrival at the Clinic

Parking and Arrival Time

On days when you are scheduled at the clinic, please plan to arrive 30 minutes prior to our first client appointment to get set up (T/TH 5:30pm, SAT 8:30am). Follow our parking and entrance map when arriving at the clinic.

Clocking In & Clocking Out

After entering the clinic, you must clock in using Microsoft Teams. Open the Shifts app, select "**Time Clock**," then press and hold the start button until you see the message, "You're on the clock." Before leaving the clinic, please clock out by opening the Time Clock again and holding down the stop button until you see the message, "You're off the clock."

Best Practices

Basic Preparers

1. Clock-in upon arrival
2. Name-tag (first and last name, followed by an "(B)")
3. Get room assignment and set-up computer/printer
4. Log-in to TaxSlayer – if difficulty logging-in, see a Site Director
5. Let Admin Director know you are ready to see a client
6. Prep clients return and try to rectify any questions with the client or an advanced preparer
7. Client docs MUST be scanned and uploaded to TaxSlayer
8. If docs are on phone, try to scan the phone, or make a note in TaxSlayer that docs were taken from client phone
9. Ask the client whether they have an **Identity Protection PIN (IP PIN),** which is provided to taxpayers who have experienced identity theft to prevent fraudulent tax fillings
10. When prep is complete, let Admin Director know you are ready for a review
11. Once review is complete, accompany the advanced preparer to walk client to client check-out station
12. **Let Admin Director know you are ready for another client**
13. Once your shift is over, delete all client documents from desktop, *unplug and put away* laptop and printer, then clock out

Advanced Preparers

1. Clock-in upon arrival
2. Name-tag (first and last name, followed by an "(A)")
3. Let Admin Director know you are ready to begin a review
4. Make sure docs have been scanned and uploaded into TaxSlayer
5. If client docs are reviewed from client phone and not scanned, be sure to make a note in TaxSlayer indicating such
6. Be sure to discuss health care coverage with client – we need to make sure that the info from form 1095-A, if using marketplace coverage, has been entered into the return. Many clients are confused about this issue.
    a. Medicare, Medicaid and employer provided coverage **doesn't** require Form 1095-A
7. Ask the client whether they have an **Identity Protection PIN (IP PIN),** which is provided to taxpayers who have experienced identity theft to prevent fraudulent tax fillings.
8. If you are reviewing the return in the preparers log-in, make a note that you (include your name) reviewed the return in TaxSlayer
9. Review completed returns with the client
10. Complete and attach client cover sheet to the client copy of the returns
11. Review the cover sheet with the client – point out results and how they can contact us with questions
12. Have clients sign our copy of the e-file authorization forms for the federal and state returns **(Forms 8879 and EL101)**
13. Point out our web address and let them know the website has links to check on refunds, tax amendments, etc.
14. Walk the client to the check-out station
15. **Let Admin Director know you are ready to begin another review**
16. When shift is finished, please assist in facility clean-up
17. Once your shift is over, make sure to clock out on Microsoft Shifts

Clinic Walkthrough PowerPoint

For additional support, please refer back to our Clinic Walkthrough PowerPoint.

Shop our VITA Merchandise

Please place your orders using our LoyolaVITA Merchandise Catalog

Email your order to classicforms123@gmail.com or call Susan McCarthy at 410-744-0252. You may pay by credit card or Zelle.

- Susan will confirm your order and total cost by email.
- After receiving the confirmation, Zelle payments should be sent to:
  - Phone: 410-991-7555
  - Email: classicforms123@gmail.com
  - Name: Classic Forms & Design
- Orders via Zelle must be paid within 2 days of confirmation. Credit cards will be processed within 2 days.

Orders will ship directly to Professor Bender's office, who will notify you upon receipt.