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.

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. Please arrive at 5:30pm on Tuesdays and Thursdays; 8:45am on Saturdays. Follow our parking and entrance map when arriving at the clinic.

Clocking In

After entering the clinic, please clock in using Microsoft Teams. Open the Shifts section, then under "**You**" select "**Time Clock**." Press and hold the start button until you see the message, "You're on the clock."

Clocking Out

Once your shift has ended and you have finished with your last client, please clock out in Microsoft Teams. To do so, open the Time Clock in Teams and press and hold the stop button until you see the message, "You're off the clock."

Best Practices

Clinic Walkthrough PowerPoint

Basic Preparers – Tips for Success

1. Clock-in upon arrival
2. Name-tag (first & last name)
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. When prep is complete, let Admin Director know you are ready for a review
10. Once review is complete, accompany the advanced preparer to walk client to client check-out station
11. **Let Admin Director know you are ready for another client**
12. Once your shift is over, make sure to clock out

Advanced Preparers – Tips for Success

1. Clock-in upon arrival
2. Name-tag (first & last name)
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 1095-A
7. If you are reviewing the return in the preparers log-in, make a note that you (include your name) reviewed the return in TaxSlayer

8. Review completed returns with the client
9. Complete and attach client cover sheet to the client copy of the returns
10. Review the cover sheet with the client – point out results and how they can contact us with questions
11. Have clients sign our copy of the e-file authorization forms for the federal and state returns **(Forms 8879 and EL101)**
12. Point out our web address and let them know the website has links to check on refunds, etc.
13. Walk the client to the check-out station
14. When shift is finished, please assist in facility clean-up
15. Once your shift is over, make sure to clock out

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