Drop Off <u>Intake</u> Steps:

1. Conduct a thorough intake interview, making sure to complete all shaded grey areas on the intake/interview form. Make notes as necessary on the intake sheet.
2. Complete and scan these items in the following order:*
    a. Cover sheet for Drop Off
    b. Drop Off supplemental questionnaire (and Consent to Use and Disclose on back side)
    c. Photo IDs and SSN/ITIN cards
    d. Form 13614-C Intake/Interview & Quality Review Sheet
    e. Tax docs
    f. Drop Off consent form
3. Review the scan for accuracy and legibility.*
4. Re-scan any documents if the scan is not clear, legible, and complete.*
5. Drag and drop the scan into the Google Drive folder for Drop Off.*
6. Enter the return details in the Drop Off Drive spreadsheet <u>IN THE TAB FOR YOUR SITE</u>.*
7. Place all documents (including any copies made) in a client envelope and return to the client.
    a. We do not keep any documents or create a processing envelope. We have the spreadsheet for record purposes, and Drop Off should have a clear, legible, and complete scan to work from.
8. Let the client know to expect a call/text/email within a week (depending on the indicated communication preference).

**Volunteers assisting with Drop Off intake will need to ask a staff member to do the scanning and spreadsheet entry.*

Drop Off <u>Pick-up</u> Steps:

1. Confirm the site at which the client originally dropped off his/her documents.
2. Open the Drop Off spreadsheet and locate the client's entry.*
3. Locate the client's return in TaxSlayer and review the Notes section.
4. Review the return with the client and answer any questions he/she has.
    a. For an e-file return, print out a copy of the return. Get the client's signature on both copies of Form 8879. Give him/her the return and one copy of Form 8879. Scan the other signed Form 8879 (with the Drop Off cover sheet on top), review it for legibility and drag and drop it into the Drop Off Google Drive folder.*
    b. For a paper return, print out two copies of the return. Have the client sign the copy going to the IRS and give him/her a pre-addressed envelope in which to mail it. Give him/her the other copy for his/her records.
5. Make a note in TaxSlayer that the client came by and signed the 8879 or picked up the paper return.
6. Make an entry in the Drop Off spreadsheet to notate (<u>IN THE TAB FOR YOUR SITE</u>) that you completed the paper return/e-file return step.*

**Volunteers assisting with Drop Off pick-up will not have access to the Google Drive or scanner. Volunteers should instead do all other steps and <u>place the signed 8879 in the pink hanging file folder</u> in the manager cabinet labeled "DO 8879s Not Scanned." If it is a <u>paper return</u>, volunteers should <u>complete an entry in the log</u> housed within the folder noting the basic client details for the return.*