

"It's My First Day" Checklist

On your first day, you'll need:

- your printed Form 13615 (Volunteer Agreement). **You will need to bring a printed copy to every tax site you will volunteer at.**
- photo I.D.
- volunteer name badge (mailed to your home address)
- this checklist
- Volunteer ID number ([How to Look Up My Volunteer ID Screencast video](#))
- Your Better Impact username and password

When you arrive on-site, the first steps are to find the Site Manager to introduce yourself. They will go through this checklist with you or ask an experienced volunteer to help you.

All volunteers:

- I checked in with the Site Manager.
- I identified the Volunteer Leadership Team member on duty.
- I turned in my signed volunteer agreement. (All volunteers must pass the Standards of Conduct test. Tax preparers must additionally pass the Intake/Interview/Quality Review and Basic test, at minimum).
- I received a lanyard and plastic badge holder for my name badge.
- I know how to sign in for my volunteer shift.
- I located: restroom for clients; restroom for volunteers/staff; snacks and water; the emergency exit.
- I know what to do if I need a translator for Spanish or other languages
- If a Tax Preparer or Quality Reviewer, I know how to set up and use Multi-Factor Authentication with TaxSlayer Pro: [Multi-factor Guide](#)

Tax Preparer:

- I was asked to shadow before completing returns on my own.
- I know where to find the customer envelope queue.
- I located the printer and extra paper.
- I know how to log in on the computers and TaxSlayer.
- I checked www.ctcresources.com for tax alerts.
- I know what to do if I get a tax return that I am not qualified to prepare.
- I know what to do when I am ready for a Quality Review.
- I know where to find printed resource materials, worksheets, and forms at the site.

Client Liaison:

- I was asked to shadow before completing the intake process on my own.
- I have been introduced to the client sign-in process/software
- I located extra clipboards, intake forms, and special checklists.
- I confirmed whether or not appointments are offered at this location.
- I know what to do if a client wants to use our drop-off services.
- I know what to do if a client is deaf or has other special needs.
- I know where to place the client envelopes in the queue.
- I know what to do if I am unsure that a client is qualified for our services.
- I know what to do if a client is missing identification or documents.

Translator:

- I know where to find the site copy of the IRS Publication 850 (English-Spanish Glossary).
- I have spoken with the Site Manager to coordinate where I will be and what tasks I can work on if translating services are not needed during part of my shift.

IMPORTANT: Whether it's your first shift or not, if you are feeling unwell please remain at home. If you are experiencing symptoms of COVID or have tested positive, please contact Ameera Sahal at ameera.sahal@foundcom.org.