

“It’s My First Day” Checklist

On your first day, you’ll need:

- your printed Form 13615
- photo I.D.
- volunteer name badge (mailed to your home address)
- this checklist

When you arrive on-site, the first steps are to find the volunteer sign-in binder and 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 signed in on the Volunteer Sign-in sheet.
- 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 located: restroom for clients; restroom for volunteers/staff; snacks and water; the emergency exit.
- I know what to do if I need a Spanish Translator.
- I know where to go if I need help or have questions.

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 my completing the intake process on my own.
- I located: the client sign-in sheet; extra clip boards; extra intake forms.
- 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 queue.
- I know what do if I am unsure that a client is qualified for our services.
- I know what 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.