

“It’s My First Day” Checklist

On your first day, you’ll need:

- your printed Form 13615 (Volunteer Agreement). **You’ll need to bring a printed to copy to every tax site where you choose to volunteer.**
- photo I.D.
- volunteer name badge (mailed to your home address)
- Volunteer ID number (found under Additional Info on your myvolunteerpage profile)
- your myvolunteerpage 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 know how to clock in and out for my volunteer shift.
- ☐ 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 translator for Spanish or any other language.
- ☐ If a Tax Preparer or Quality Reviewer, I know how to set up my Multifactor Authentication login for my Tax Slayer Pro account

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
- ☐ I located: the client sign-in sheet; extra clip boards; extra intake forms.
- ☐ 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.

Important: Prior to each on-site volunteer shift (whether it's your first shift or not), if you are feeling unwell please remain at home. If you have been exposed to someone with COVID and had contact with our staff, volunteers, or clients please contact Miller Wilbourn at miller.wilbourn@foundcom.org.