Reference Librarian **1**	Takes appointments Hands out packets Contact Client Facilitator or Joann Bowes-Taylor (LC) if appointments fill up and the client requests us to see if we can add a TC

Client Facilitator **CF** **2**	Sign in clients in the order on the appointment sheet **New: If a client misses their appointment, call them and see if they can arrive within 30 minutes of their appointed time. If so, we will honor the appointment. If not, they will need to reschedule.** **The CF can move up an appointment if the client is present or if there is a walk-in waiting, the CF can assign.** Taxpayer/s must have photo ID/s and Social Security Cards for <u>each</u> person on the tax return. Give or Verify the Taxpayer/s has the Intake/Interview Quality Review Booklet and have the Taxpayer/s answer each question in parts I thru V (page 1 thru 3), plus the consent forms. Prepare a "Tax Return Status Sheet" for each Taxpayer/s (Taxpayer/s name, phone number, date, type of return and Tax Counselor initials) and assign Taxpayer/s to a Tax Counselor. Note: Tax Counselors will report to the CF desk for assignment of the first 1 to 4 Clients. Note: Taxpayer/s returning with a "P**ink Card**" (those returning with signed 8879 signed or returning with missing documents), and those Clients with 'questions only' can be helped by the floating ERO or the next available Tax Counselor.

1st Tax Counselor **3**	Review the Intake/Interview Quality Review Booklet with the Taxpayer/s and assure all documents are available per pages 1 & 2. Make notation of any facts or changes which may affect tax law on the Intake/Interview Quality Review Booklet. Change all "unsure" answers to "yes" or "no" and initial who made the change. Enter the tax return data into TaxSlayer. If entry is complete – Set up for quality review**-** initial or check "Ready for QR" on the "Tax Return Status Sheet", write the Taxpayer name on the Taxpayer Envelope, place all documents (except the "Tax Return Status Sheet") in the envelope, give the Envelope to the Taxpayer, and have the Taxpayer/s wait in the seating area for the assigned Tax Counselor Reviewer. Place the "Tax Return Status Sheet" last out on the Client Facilitator's Quality Review File. (**Step A**) If entry is not complete - set the return stage (tag) in TaxSlayer to the appropriate pending reason. Check pending and initial on the "Tax Return Status Sheet", and make written notation of each item needed to complete the return. Prepare a "**Pink Card**" for the taxpayer/s indicating each item of information needed and return all documents to the Taxpayer/s. Advise the Taxpayer to return to the site when the missing items are obtained, and present the "**Pink Card**" to the Client Facilitator. Note: Do Not issue a "Pink Card" to those Clients for which no tax entry was made. Place the "Tax Return Status Sheet" in the Client Facilitator's Pending file.

Client Facilitator **4**	Assign an available Tax Counselor Reviewer to the first Taxpayer In order of the "Tax Return Status Sheet" review file. Note: For Pending "Tax Return Status Sheets" - make a notation on the Site Activity Log as pending for?? +++(reason)++++, or NNTF for "no need to file", OOS for "out of scope" or check the "question & answer" column of the Log if determined to be for question only. **New: Once a TC is free assign the next appointment or a walk-in** **New: When/if a pink card (given to clients that have Pending returns due to missing documents or final signatures) is returned the CF moves them to the front of the line for missing documents. For missing signatures where the return has already been Quality Reviewed, the client is sent to the ERO.**

2nd Tax Counselor (Reviewer) **5**	Review with the Taxpayer/s all information on the return; verify that all data and numbers match the source documents and complies with current tax laws. Advise the Taxpayer/s that they are responsible for the information on their tax return. Print the tax return, have the Taxpayer/s sign form 8879, and give all documents to the Taxpayer/s. Initial (or check) the "Tax Return Status Sheet", "Ready for E-file." Give the "Tax Return Status Sheet" to the ERO for transmission to the IRS. If pending for spouses' signature on form 8879; print the return, prepare a **"Pink Card"** indicating 8879 signatures needed, and advise Taxpayer/s **to return and present "Pink Card" and 8879** to the Client Facilitator. If pending for needing more information or documents, follow (**Step A**) in block 3 above.

ERO **6**	Give the "Tax Return Status Sheet" to the Client Facilitator **or** finalize the "Site Activity Log" in the "Federal Return Sent/Acknowledged" column in the absence of the Client Facilitator.

Client Facilitator or ERO **7**	Initial the Site Activity Reporting Log with reviewer's initials, and check in the proper column the type of return: E-file, Prior Yr., Amended, Question or Federal Return Sent/Acknowledged. Enter the hold or pending reasons in the comments field of the log.

Client Facilitator (Closeout) **8**	Reconcile the "Tax Return Status Sheets" with the Site Activity Reporting Log. Make sure all E-files have a "Tax Return Status Sheet" indicating ready to E-file or E-file sent/acknowledged. Arrange E-files (Tax Return Status Sheet) in alphabetical order. Assure all pending files have a Tax Return Status Sheet indicating the missing info needed from the Taxpayer/s. Note: In absence of CF, ERO may "closeout"