

# **SITE LEADER CHECKLIST**

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## *Prior to your session:*

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- ❖ Visit the Site Leader Resource page: <https://www.goladderup.org/site-leader-resources/>
  - Print Morning Meeting Notes
  - Print Volunteer Sign Up List from VolunteerHub or Deputy (Seasonal Staff Schedule)
    - Check to see if anyone speaks another language!
  - Print VITA Tax Alerts
  - Print additional announcements from Ladder Up **Site Leader email** or IRS
- ❖ Refreshments and sealed individual snacks should be available at all sites, please let us know if you are running low for additional deliveries.
- ❖ Locate Ladder Up's emergency contact information and site leader phone number sheet in the Site Binders.
- ❖ Ladder Up will reach out with updates on extremely bad weather and site closures. Information on this site will be updated: <https://www.goladderup.org/site-closures/>

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## *Upon arriving at your site:*

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- ❖ Introduce yourself to building staff, if available
- ❖ Locate storage and supplies and put on your name tag!

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## *Site Set Up:*

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- ❖ **Greet the Case Reviewers and Site Support Staff.** Assist them with locating their supplies (checklists, tracking sheets, eligibility posters, and Civil Rights and Ladder Up informational posters).
    - Allow them to set-up their area and get started with screening the clients as soon as possible.
  - ❖ **Print out VHub Daily QR Code** and post for volunteers to scan for checking in.
  - ❖ Make sure that the computers are connected, and that the printer is operating. For more information, refer to the most updated technology manual on the site leader website under *Technology & Supply Resources*.
  - ❖ **Greet volunteers and assist them with getting settled.**
1. **Conduct Check-In Meeting(s):**
    - Use the notes/outline from the Site Leader website.
  2. **Begin serving clients depending on what service the client scheduled.**
  3. **Monitor questions and client/volunteer/data flow:**
    - Monitor that questions on intake forms are being answered correctly
    - Double check that volunteers are keeping the correct consent forms for clients and being put in the appropriate folder once complete.

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## *How to E-File:*

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1. Log in to TaxSlayer Pro Online with your login credentials.
2. Make sure you are starting with the current tax filing year **2023**.
3. Click **Select** on the **Transmissions** line. (**Listing all returns that have been marked complete.**)

**Note:** To sort the columns within the Transmissions menu, click the column header.

4. Verify you have the client's **e-file signature pages for every year** they have filed.
  - a. You must have a consent form in addition to the e-file signature.
  - b. You can mark each e-file page with a check mark after verifying you have a complete return on file.
  - c. If there are any missing e-file signature pages, you **must** take a note of the client's name, as well as the filing year and email your assigned support specialist so they can contact the client.
5. Select the check box(es) on the returns you want to transmit.
6. Once you have selected the returns you want to transmit, click **Transmit selected return(s) to IRS** on the bottom right corner.
7. Make sure there are no pending returns on the Transmissions que.
8. To change the tax year, click **Back**, this will send you back to the main menu.
9. On the top right corner, click the **Change Tax Year** drop-down menu and select the next tax filing year you need to complete.

**Reminder:** You will have to do these steps for every filing year to ensure you have not missed any e-file returns.

### **Rejected Clients:**

You do not need to contact clients when you see rejected returns. Your assigned Ops specialists will be the one working through rejections and any follow-up needed from the client.

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## *Wrap up your Session:*

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- ❖ Thank volunteers for coming out and giving their time.
- ❖ Gather client consent forms and e-file signature pages, alphabetize them, and store them in the bin provided.
- ❖ Make sure all stations are sanitized and computers are locked or stored away.
- ❖ Create packets for next session, if needed.
- ❖ Put away all paperwork and equipment at the end of each session

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## *Reimbursements:*

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Receipts (scan or photo is fine) must be e-mailed along with completed reimbursement forms within **30 days** to [accounting@goladderup.org](mailto:accounting@goladderup.org)