Admin Role Instructions

1. Locate the virtual tax prep session printed tax returns. Place in envelopes and write addresses on them. Give the stack of ready to mail envelopes to Trisha.
2. Pull all the folders from the “completed” box and do the following:
    a. Check the tab and make sure the client name is legibly written in last name, first name format. Correct as needed.
    b. Check the cover sheet to verify that the QR name is filled in. Correct as needed.
    c. Arrange the contents of the folder so that the 8879 is on top followed by the EL101 then the Intake form. Put all other documents inside the Intake form.
3. Once folders are all cleaned up, alphabetize by last name.
4. Open the google tracking sheet and mark that these clients are “ready to efile”.
5. Pull all the folders from the “incomplete” box and do the following:
    a. Check the tab and make sure the client name is legibly written in last name, first name format. Correct as needed.
    b. Open the google tracking sheet and enter notes as to why the client is incomplete using the notes on the cover sheet.
6. Once incomplete folders are cleaned up, alphabetize by last name.
7. Update remaining client names on the google tracking sheet to indicate no-shows, out of scope, etc. Consult the greeter station as needed for no-show information.

Once you have completed the first set of folders, there should be more in the boxes. Keep performing the above steps until you catch up with the tax preparers.

The Site Manager may have additional administrative tasks such as calling clients, mailing documents that were retained in error, sending letters to unresponsive clients, etc.