General checklist

Things to check initially at your site:

1. We asked for a network connection for the coordinator. First day you may want to bring an extension cord and network cable just in case.
2. Supplies are handled by Laura O'Keefe. Let her know if you're running low.
3. Laura also will be able to get you help with network problems.
4. Locking file cabinet and file folders. Filing client Forms 13614-C by date seems to work best.

On the first day, get contact information for all preparers and site contacts. Most students are wireless and prefer text to email.

Where possible, clients and preparers should have reasonable privacy and sit side-by-side during preparation. If you need the facility rearranged for better workflow, ask Laura to set up.

TaxWise

TaxWise runs in Internet Explorer or Chrome. Not FireFox. Click here to access:

https://twonline.taxwise.com/User/Login.aspx?ReturnUrl=%2f

If your default browser is not IE or Chrome, copy and paste this link to IE or Chrome.

You will receive login instructions for yourself from Laura O'Keefe for your site. You have a site number, user ID and password. Initially, your password will be the same as the user ID and you'll be prompted to change it.

As a site coordinator, you must set up your preparers. Select Manage Users for this.

Daily checklist

Day before

1. Check calendar - https://signin.bookeo.com/ Print out to manage appointments. Note special needs. You will receive the login, which is normally the email address you use with us and password, which is normally your site name.
2. Confirm attendance. Remind preparers, ask if attendance problems; transportation, etc.
3. Review TaxWise for rejects. Contact client if more info needed.
4. If you have attendance problem contact Sheryle or John.

Day of

1. Clients will normally be there on time.
2. Arrive about 20 minutes early to review setup.

E-filing

1. This is the site coordinator's responsibility, including following up on exceptions.
2. Biggest error is taking dependent credit for person already claimed by another.
3. If client entitled to dependent credit file Form 8332.
4. If possible, best to upload as you go to catch errors promptly.
5. Acknowledgment takes about 15-20 minutes. State lags federal a few minutes.

Daily wrap-up

1. Cross-check returns v. appointments for completed returns.
2. Create followup file for incomplete returns.
3. List of supplies needed to Laura or Sheryle.