

# Site Manager Daily Shift Checklist

Use this checklist every shift to ensure consistent, compliant site operations. Complete each section in order and initial when done.

## 1. PRE-SHIFT SETUP

45–30 min before clients

### Site Readiness

- Arrive at least 30 minutes before the first appointment
- Unlock site and confirm space is clean, well-lit, and accessible
- Set up client waiting area with appropriate seating and clear signage
- Post all required IRS and DCWP signage (verify visible and current year)  
*Includes: VITA banner/poster, taxpayer rights, privacy notice, non-discrimination policy, scope of service*
- Verify site has adequate blank Forms 13614-C, 2026 DCWP Surveys, and envelopes

### Technology

- Power on all laptops and confirm they connect to internet/Wi-Fi
- Log into TaxSlayer Pro Online on each workstation and verify access
- Test printer functionality and confirm sufficient paper/toner
- Verify any site-specific tech (scanner, external monitors, etc.) is operational

### Staffing

- Confirm scheduled staff with Taylor and Jose
- Confirm all scheduled staff and volunteers have arrived and clocked in or communicated status
- Verify each preparer is certified at the level required for today's assignments  
*Certification levels: B (Basic), A (Advanced), M (Military) — match to return complexity*
- Ensure you have a folder of all Volunteer Agreements Form 13615 for every staff member and volunteer
- Brief team on any updates, reminders, or flagged issues from other sites or prior shift
- If a volunteer or staff member is absent, notify Jose and Taylor immediately

## 2. SITE OPERATIONS

During client hours

### Client Flow Management

- Ensure Intake Coordinator follows the full Intake Checklist (photo ID, TINs, scope check, 13614-C)
- Monitor income thresholds: \$97K with dependents / \$68K without
- Assign returns to preparers matched to certification level
- Monitor client wait times and manage flow to minimize delays
- Ensure staff take breaks; especially when a shift is 6+ hours long

### Quality and Compliance Oversight

- Confirm every return goes through quality review before client signs (no self-review)  
*Preferred: designated QR reviewer. If unavailable, peer review is acceptable.*
- QR verifies: filing status, dependents, all income, adjustments, credits, ACA, direct deposit info
- Client signs both copies of Form 8879 and NY Form 579
- Preparer does NOT disclose refund/owe amounts — QR handles this during review with client

- If a preparer is uncomfortable with information provided, they should stop and come to you

*Per IRS due diligence: inconsistent or questionable info must be clarified before completing the return*

### Self-Employed Clients (SETP)

- If client indicates 1099-NEC or cash income, provide the Self-Employment Tax Worksheet
- Ensure SETP returns are assigned only to preparers with appropriate experience/training
- Flag complex SETP situations to SETP dedicated sites/virtual option

### Real-Time Issue Management

- Address client concerns on-site when possible before escalating
- Log any incidents, complaints, or unusual situations in the shift notes below
- If TaxSlayer Pro Online goes down, switch to drop-off contingency immediately

### Drop-Off Returns

- Complete intake and interview in full before taxpayer leaves the site
- Secure a phone number and email address for follow-up and explain the virtual/drop-off process
- Have taxpayer sign Form 14446 (Virtual VITA/TCE Taxpayer Consent)
- Provide an estimated date/time for return pickup or QR callback
- Store documents securely — all taxpayer info must be locked/protected at all times

## 3. END-OF-SHIFT CLOSING

*After last client*

### Returns and Paperwork

- Transmit returns that have been reviewed and signed off on, turn any returns not transmitted into Paper file and explain in a note whether the client is expected to return or not
- Confirm all completed returns that are marked “Complete” in TaxSlayer have a note explaining why it is not transmitted
- Any returns marked “Ready for Review” should have a note explaining why it is not approved, transmitted, or marked paper
- Organize all signed paperwork per return (8879, 579, 13614-C, tax docs)
- Securely store all taxpayer documents — nothing left unsecured on desks or in open areas; check the copier/scanner
- Account for all drop-off returns

### Technology and Supplies

- Log out of TaxSlayer on all workstations; clear browsing history
- Power down and securely store all laptops (locked cabinet or designated area)
- Note any tech issues encountered during the shift for Jose and Taylor
- Check supply levels: 13614-C forms, envelopes, printer paper/toner, pens

*If supplies are running low, send request via Jotform well before next shift*

### Site and Reporting

- Clean and reset the site (remove personal items, straighten furniture, discard trash)
- Remove or secure any taxpayer-identifying information from scrap paper
- Lock site per facility partner’s protocol
- Submit end-of-shift report to Taylor and Jose:

*Include: # of no shows, # of walk-ins taken, general taxpayer trends, staffing issues, incidents, supply needs*