**Volunteer Income Tax Assistance (VITA)**

**Taxpayer Check-In**

Each taxpayer that comes to the VITA site will first be greeted by a Greeter and will receive a packet contains a Pre-Intake Questionnaire, used to determine whether their tax situation is suitable for VITA and the certification level requirement of the tax payer.

**Intake and Interview Sheet**

After the taxpayer has been determined suitable for VITA service, the greeter will distribute the “Intake/Interview & Quality Review sheet” to Resident taxpayer or “Nonresident Alien Intake and Interview Sheet” to Nonresident taxpayer.

**Transmit to tax preparation**

After the information gathering is finished, the taxpayer’s name and his residency status will be recorded on a Google document and ready for tax preparer. Once there is open tax preparer matching the qualification of the tax payer, the tax payer will be sent to the actual preparation site for the return. The ready signal is represented by the color mark-up on the document.

**Tax Preparer**

Tax preparers need to prepare their daily activity log to record the tax returned finished during the shift, including information such as Taxpayer information, Sign-In & out Time. The status of each return will also be recorded on the daily activity log.

**Return Review**

Once the return is finished, the preparer will fill out “Preparer Transmittal to Quality Review” and transmit the return with the information sheets and a copy of each W-2 form to quality reviewer, with higher certification levels for quality review.

**Off-site Review and Follow-up**

All the returns will be reviewed again off-site and electronically filed for the tax payer. If any additional information need to be collected or any errors, tax payer will be contacted.