

WELCOME TO AccountingAidSociety

Site Coordinator
Training

January 20, 2022
5:30pm

**We use taxes to build relationships.
And relationships to build futures.**

Presenters: Matt Hetherwick, Kelly Lepper, Rhonda McCleese, Sam Spolarich, Gabrielle Thomas, Chelsea Vitale

Agenda

Welcome & Introductions
Covid Protocols
Quickbase Procedures
Federal Intake Supplemental Sheet
Tax Law Updates
Tracking Volunteer Hours
Volunteer Cancellation Procedures
Site Manual/Material Toolkit
Site Closure (Inclement Weather) Procedures
Site Coordinator Updates
Equipment/Site Boxes
Who to contact with questions
Remote Tax Prep Volunteer Opportunities
Wrap Up/Questions

Welcome, Priscilla Perkins!





COVID Protocols

COVID-19 Policies and Protocols

Material to Review

- [Review Agency Vaccination Policy](#)
- [Review COVID-19 Policy Guide](#)
- [Review Safe Work Guide](#)
- [Review Site Preparedness & Response Plan](#)
- [Training Slides](#)

Prior to Reporting to an AAS tax site

- Those who opted out of self identification must make sure their weekly testing has been sent to HR before reporting to work.
- All employees reporting to work should complete the mandatory [Visiting Office Self Screening Survey](#) daily in order to screen themselves for exposure, symptoms, or fever.

Reporting to an AAS Tax Site

- Site Supervisor completes opening tasks listed on their [site's daily checklist](#).
- Clients are being screened before entering the facility/suite. [Client screening form](#)
- Site Supervisor will remind the client to wear a mask at all times and social distance during services.
- Site Supervisor completes the closing tasks listed on the [site's daily check list](#), updates the checklist and emails to HR.

Site Supervisor Responsibilities



A teal-tinted background image showing a group of people in a meeting or office setting, looking at documents or a screen.

Quickbase Procedures

Quickbase Procedures

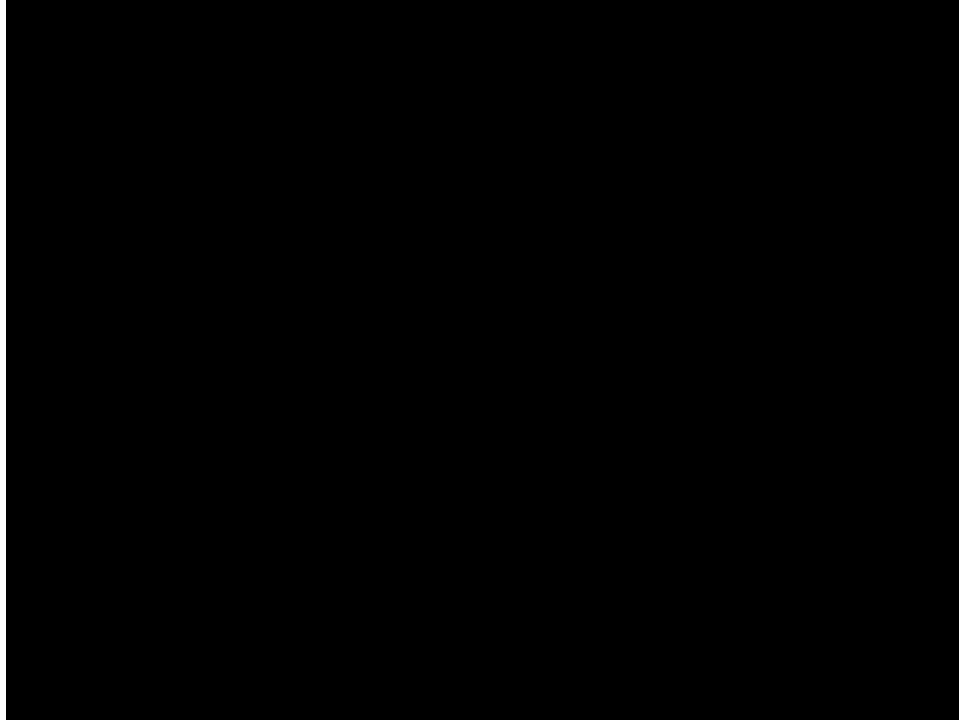
- Different than last year
 - No longer tracking who prepares and quality reviews in Quickbase
- One account for each tax site
 - Logins will get sent out early next week

Walkthrough: [Quickbase](#)



Federal Intake Supplemental Sheet

How to Use the Federal Intake Supplement



???Questions???

A teal-tinted background image showing a group of people in a meeting or office setting, looking at documents and talking.

Tax Law Updates

Federal Updates

- Electronic Filing begins on January 24th
- Advanced Child Tax Credit (“AdvCTC”) recipients began receiving IRS [Letter 6419](#)
 - MFJ filers will receive two letters, one for the primary filer and one for the spouse ([Letter 6419 MFJ](#))
- Expansion of credits for sick and family leave (more will be provided via the first Site Coordinator update)
- Any changes/updates will be communicated through weekly Site Coordinator updates

State of Michigan Updates

- Electronic Filing begins on January 24th
- Gambling losses may now be excluded from AGI on a State of Michigan Return
 - Filer must file an itemized Federal Return
 - Expenses cannot exceed winnings
- Still waiting on Treasury to provide additional guidance on CERA funds regarding payments made to tenants
- Any changes/updates will be communicated through weekly Site Coordinator updates

A teal-tinted background image showing a group of people, likely volunteers, working together in an office or community setting. The image is slightly blurred and has a consistent teal color overlay.

Tracking Volunteer Hours

Options For Tracking

Managed by Site Coordinator

[Volunteer Kiosk Overview](#)

[Mobile Volunteer Sign-In](#)

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Volunteer Cancellation Procedures

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Cancellation Policy:

Please make sure that you are able to commit to the designated time. We schedule client appointments based on the number of registered volunteers, so this will help ensure that our tax sites are staffed appropriately. If you need to cancel your registration, please do so with at least 48 hours' notice. There is a cancellation link in your automatic confirmation email.

If it's short notice (i.e. within 48 hours of your shift, please contact Chelsea Vitale cvitale@accountingaidsociety.org) in addition to using the cancellation link.

A teal-tinted background image showing a group of people in a meeting or collaborative work environment. The image is partially obscured by a white horizontal band containing the title text.

Site Manual/Material Toolkit

Material Toolkit

[2022 Tax Site Documents/Material Toolkit](#)

- This folder has all of the intake documents found in the site boxes plus some additional supplemental documents you may choose to use.
- If you run out of any materials you can print them here
- A link will be added to the Site Manual on our website

If you would like access to any material that are not currently in this folder, send the request to sspolarich@accountingaidsociety.org

Site Manual

Instead of a printed site manual we will have a living digital version again this year

It can be found on the resources website here: [SITE MANUAL](#)

The site manual is currently being updated for the 2022 and will continue to be updated throughout the seasons as changes are made.



Site Closure (Inclement Weather) Procedure

Site Closure (Inclement Weather) Procedure

In Case of Inclement Weather:

A cancellation notice will be posted on the [Accounting Aid website](#) by 8 am if some or all of the tax sites are closed. Please check this website prior to leaving the house any time you suspect inclement weather. If there is no notice, the tax sites will proceed as scheduled.

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Site Coordinator Updates

Site Coordinator Updates

- Updates will be provided weekly
 - Posted on the [Accounting Aid Resources page](#)
 - Will also include any updated [Volunteer Tax Alerts](#) and/or [Quality Site Requirements Alerts](#)
 - Please share with all volunteers at the tax sites each week

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Equipment / Site Boxes

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- Site boxes, COVID supplies and equipment have been delivered to most sites already
 - OLHSA and Lighthouse will be delivered and set up Monday and Tuesday
- If any more supplies are needed, please let us know

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Who To Contact

Who To Contact

- Site Support
 - Chelsea Vitale
 - cvitale@accountingaidsociety.org
 - 734-991-3621
- Volunteer Support
 - Kelly Lepper
 - volunteer@accountingaidsociety.org
- COVID Questions
 - Rhonda McCleese
 - hr@accountingaidsociety.org

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Remote Tax Prep Volunteer Opportunities

Remote Tax Prep Volunteer Opportunities

- For those that have been asked about remote volunteer opportunities
- Currently developing the volunteer experience using a new program through Get Your Refund
- More information will be provided in the next couple of weeks
- Kelly has compiled a list of volunteers that indicated their preference for a remote volunteer experience

Accounting Aid Society SINCE 1972

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Questions?