

**Greeter**

**Appointments:**

1. Greet Clients! Smile and treat all clients with respect.
2. Ask if the client has an appointment.
3. Ask for I.D and social security cards for everyone that will be on their tax return.
4. Ask to see their income statements and deductions.
5. Give clients an intake sheet and other paperwork to fill out while they wait.
6. Ask if they need assistance filling out paperwork.
7. Let the client know once done with paperwork to bring it back to you so you can make sure everything is filled out correctly. All questions are answered.
8. Mark intake sheet it Advance or Basic
9. Take them back to the preparer. Introduce client and preparer. Example (This is Bob he will be helping you today with your return. Bob this is Ms./Mr. Wright)

**Drop Offs:**

1. Ask the client if they’re dropping off or walk in (if available). Walk in treat like appointment.
2. Ask for I.D and social security cards for everyone that will be on their tax return.
3. Ask for all income statements and itemized deduction statements.
4. Make copies of everything.
5. Give clients an intake sheet and other paperwork to fill out.
6. Ask the client to have a seat and fill out everything and bring it back to you when they are finished.
7. Ask if they need assistance.
8. Go over the client check list to make sure they have everything they need. Put everything in the envelope.
9. Ask your site coordinator about the procedure on pick up.

**Pick Ups:** Ask Site Coordinator how to handle pickups.

**Dress:** Business Casual. No tank tops, belly shirts, short shorts.