To date, we have served over 800 clients saving $200,000 in tax prep fees and returning $1.8M+ in federal and state refunds. We have served almost 200 more clients this year than last year at this time. Please read below for important information, process changes and reminders.

**Drop Off Model - Status**
We are increasing the number of screeners/shift so that we can take in more clients and reduce wait times. The pick-up process is moving smoothly and efficiently. We are ahead of schedule and returns are done through the pick-up date of 2/24. We are working on an internal system to notify clients for early pickup.

**Urgent Volunteer Needs**
Please click [here](#) to see the shifts that have the most need for volunteers. Reach out to [Lee Ana](mailto:Lee.An@organization.com) if you have availability outside of normal shift times.

**Roc Your Refund (RYR)**
We need to recruit 800 participants to the Roc Your Refund pilot program. We will be recruiting eligible clients during pick up, as well as, drop off.

- **Pick Up:** Eligible clients (*City residents w/ at least one dependent*) have an RYR flyer clipped on their client review sheet. Please give the client the flyer and invite them to meet with the RYR staff when they are done with the pickup. This will ensure that anyone eligible is directed to an RYR staff; even if they don’t have a green QR coversheet.

**Screener Updates:**
- **Screening Form/Drop Off Info:** These forms have been merged into one document to eliminate the need to open them separately while screening.
- **Paper Forms:** We will have hard copies of forms later this week, so screeners can use the option that works best for them; online or paper.
- **IRS Site Requirements** – Please make sure 13614-C forms are complete including shaded areas during the screening process.

**Front Desk Updates**
- **Consent Forms:** We are including the CASH and Virtual VITA Consent forms with the intake paperwork for clients to complete while they wait.
- **Parking Vouchers:** Any client who parked in the Court St. garage to drop off or pick up should be given a parking voucher. This also applies to those who we turn away.
- **Number Display:** Screeners will check with FD before calling the next number; this will help to make sure the correct number is displayed and there is no one waiting to be seen or a special circumstance.
- **Pick-Ups:** Those assigned to pickups (Staff or volunteers) will be coming to the desk to request the next pickup. Please make sure client paperwork is facing away from the waiting area and in order by appointment time.
- **When there are 2 FDMs:**
One will be responsible for Drop Off clients; giving numbers, providing clipboards, and parking passes.

The other will be responsible for Pick Up appointments; completing client return sheet, checking off the names on the pick-up appointment schedule.

Both can restock clipboards, forms and answer questions.

**CASH Advisors Updates:**

To increase client engagement and help improve site flow, CASH Advisors can help clients complete their intake paperwork* in the waiting area. This allows volunteers to easily identify those that want information about community resources and bring them back to the CA desk for advising. They will then return to the waiting area to be called for screening. Keep the front desk informed of what number you are CASH advising, so they know where to find them if their number is called.

*If clients have tax related questions, let them know the screener will be able to answer them.

**Volunteer Reminders**

- **IRS Site Visits** – Please remember to wear your nametags each shift and if screening, ensure the 13614-C is completed (including shaded areas).

- **Sign Up For Shifts On The Volunteer Hub**
  - Make sure you are signing up for the correct role; please reach out to Lee Ana if you have questions.
  - Shifts with an urgent need can be found [here](#).

Thank you for reading through our updates, please feel free to contact Lee Ana or I with any questions.

**Berta**

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