To date, we have served over 1,300 clients, saving $325,000 in tax prep fees. We have served 285 more clients this year than last year at this time. I want to thank you for your continued flexibility, as we make changes to our process to better serve our clients and increase our efficiencies. We truly appreciate your willingness to put program needs first and jump in to help out when and where it is needed.

Please read below for important updates.

**Drop Off Model - Status**
We are completing returns much sooner than the scheduled pick up appointment. In an effort to keep within our 3-5 day pick up range, we will be reaching out to clients whose returns are complete. This will allow us to free up appointments for incoming clients.

**Urgent Volunteer Needs**
Please click here to see the shifts that have the most need for volunteers. Reach out to LeeAna if you have availability outside of normal shift times.

**Language Access**
Per federal guidelines, clients have the right to an interpreter by request. It is imperative that clients decide when/if they need an interpreter and it’s our responsibility to ensure they feel welcome to do so and not like an inconvenience. Below are some tips/videos when working with a client who may need an interpreter:
- Inform clients that a certified interpreter is available via phone or an appointment can be made for an in person interpreter. **Note: Children under 18 should not be used for interpretation.**
  - If they decline and you are experiencing difficulty communicating with them, let them know you would like to use an interpreter to ensure you are providing quality service.
- Using Language Line Services (over the phone) [Video]
- Working with an In-Person interpreter [Video] [Document]
- ASL Interpreting 101 - Ted Talk

**Data Entry Help Needed**
To keep our return tracking database up to date, we need help with the following on a daily basis. If you or someone you know is comfortable and quick with data entry, please let me know ASAP. We are also able to provide a stipend for this assistance, if necessary. This requires about 4-6 hours/day. Below is a summary of tasks:
- Inputting data into Access database
  - New client data
  - Logging returns activity (i.e. in/out of tax prep)
- Filing client envelopes alphabetically
- Updating returns in TaxSlayer for transmission

**Screener Updates:**
- **Screening Form/Drop Off Info**: These forms have been merged into one document to reduce redundancy and are available on the Screener tab and in paper form.
- **Pick Up Appointments** – let clients know that we will be contacting them when their return is completed, which is most likely before their schedule appointment date.
For clients requesting an in-Person interpreters for ANY language including sign language, book their appointments at least **one week out**. This gives us the necessary time to arrange for an interpreter.

**Front Desk Updates**
- **Parking Vouchers**: Please **ask** clients, including those we turn away, if they parked in the Court St. garage and provide them with a parking voucher.
- **Pick-Ups**: For any clients returning outside of their scheduled appointment, please let them know we will do our best to see them within a 2 hour waiting period; clients with appointments will be seen first.

**CASH Advisors Updates:**
We will be adjusting the number of advisors needed per shift and Lee Ana will notify any impacted volunteers. We also want to maximize the time and effort you provide to CASH. When experiencing down time, Lee Ana or Mai (Client Services Coordinator) will be asking for your help with some of the following tasks:
- Copies - Making copies of client documents (i.e. photo IDs, social security cards, bank info)
- Pick up Prep*- Pulling client files for the next day’s pickups and checking for Roc Your Refund (RYR) eligibility. *Staff will provide instruction.
- Data entry – entering CASH questionnaire data into online system, helping enter client data into the return tracking database.
- Filing- Organizing completed returns in alphabetical order, and other filing tasks. This would require bending over often.

**Federal and State Refund Information**
The report that shows relevant credit and refund information is only available for those returns that have been e-filed. Since a client has to pick up and sign the return before its e-filed, there is delay in available information. I will begin sharing more detailed refund information in the coming weeks.

**Volunteer Reminders**
- **CASH Volunteer Info Webpage** – Previous weekly emails and IRS tax alerts are available.
- **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*