



Drop Off Services: Overview

We started a Drop Off service several years ago to decrease the client wait time. If you are assigned to the intake desk, make sure everyone who signs in knows that Drop Off is an option if they don't want to wait a long time to meet with a Tax Preparer in person. Regularly make an announcement in the waiting room to ask if anyone wants to use the Drop Off service. It is important that we all promote the program so that clients can make an informed decision about the best option for themselves.

How does Drop Off differ from the walk-in service?

- Clients won't directly meet with the Tax Preparer. The Tax Preparer will use the intake forms, the tax documentation from the client, and notes from the intake interview in order to prepare the return.
- The return will not be ready same-day. If they must have their return filed today, they should use the regular walk-in service.
- Client documentation is scanned into a secure online drive, which is then accessed by Tax Preparers at Prosper Center South to be processed. After the return is complete, the client can pick up their return from any site.

How long will tax preparation take for Drop Off returns?

Clients will hear back from us within a week. Our actual goal is to contact the client within 3 days, but during really busy times it often takes longer.

Once the return is finished, the Drop Off staff will contact the client and tell them to return to a site for pickup.

Can I conduct a Drop Off interview?

Drop Off interviews will only be conducted by staff or volunteers with a Tax Preparation certification (Basic, Advanced, or Military). Additional resource information is on the www.ctcresources.com website, and you can ask for on-site orientation. Ask for all the help you need.

What do I do when someone comes to pick up a drop-off return?

First, ask if the client received notification that their return is complete.

If yes, notify a staff member that the client needs to pick up a drop-off return.

If no and it's been less than a week since they dropped off their documents, then politely explain that they will need to wait for communication from us. **If no and it's been more than a week since they dropped off their documents**, it's possible that we've been unable to reach them using the contact information on file. Ask a staff member for assistance.