FOUNDATION COMMUNITIES
PROSPER CENTERS

Greeting and Sign-in

Regardless of your role in the tax site, it is important to be aware of new clients walking in who may need to be greeted and pointed to the sign-in when the primary greeter at the site is unavailable. At times, the Site Manager may assign a volunteer to the reception area to focus on greeting to ensure that clients are receiving prompt service.

At our smaller sites, the intake desk is the first place a client should go, and the sign-in is an actual piece of paper. Direct clients to put their names on the sign-in sheet and check that you can read their writing before handing them an intake clipboard.

At our two largest sites – Prosper Centers North and South- greeting is managed by a staff Client Support Specialist (formerly known as a Navigator) at the reception desk, and the sign-in is electronic. The Prosper Centers are home to other Foundation Communities' services, and the electronic sign-in allows clients to sign in at the same place for any service, streamlining the process. If you are volunteering at Prosper Center North or Prosper Center South, ask for a hands-on tutorial with the sign-in so that you can direct clients on how to use it if the Client Support Specialist is busy or has stepped away from the desk. Also ask to see the Frequently Asked Questions Guide, which will have answers to the most common questions that people have when they come in.

After they sign in, instruct the client to pick up a clipboard with intake forms that they will fill out while they wait for an interview. They should keep the clipboard until called up for an intake interview. At the top of each clipboard we place an eligibility notice to help clients screen themselves before they wait a long time in line. Draw their attention to the questions before asking them to have a seat in the waiting area. If they have a question about their eligibility, you will need to address the issue immediately to determine if the client can be helped today. It's important that we don't make clients wait unnecessarily. If they are ineligible, we want to know as soon as possible. The intake coordinator or site manager can help you if you have any questions.

Once seated in the waiting area, clients should begin completing their intake paperwork while they wait for a Client Liaison to call them up for an interview. If a client needs help filling out the intake sheets, let them know that we'll be happy to help them once they are called up. There are many reasons why clients cannot fill out the forms on their own. They may have poor vision, difficulty with using their hands, or they may not know how to read. Do not make the client feel uncomfortable or force them to complete the forms on their own. Remember, our job is to provide a service that is free *AND* excellent.