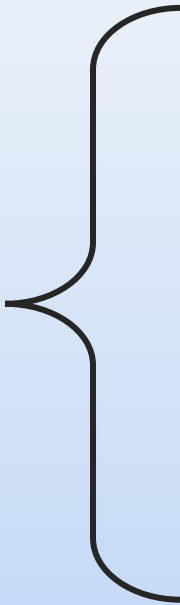
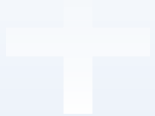


Our Drop Off Program

Overview for VITA Conference Tour September 23, 2026

Agenda



- Benefits
- Pathways
- Scenarios
- Staffing
- Timeline
- Checklist
- Demo
- Challenges
- Q&A



About us

Catherine Cusick, EA — Drop Off Manager

Andy Liebler — Drop Off Manager

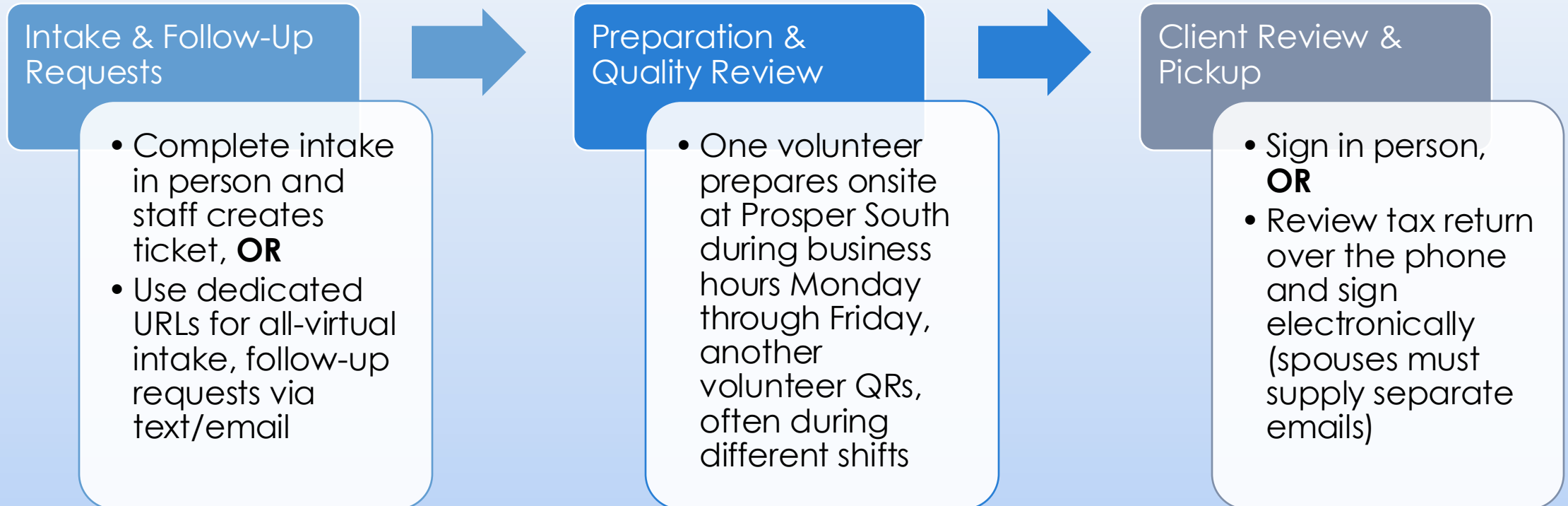


Benefits of Drop Off

- Dedicated space at the back of Prosper South, where preparers can research and prepare complex returns
- Frees up resources at physical locations, increasing program efficiency and impact — volunteers save time concentrating on common scenarios
- Our program has been established for 15 years, with Andy for 13 of them, so client retention year after year is high
- Texas residents don't often deal with state returns — state return expertise helps clients who do travel or relocate
- Drop Off Preparers and Quality Reviewers have access to institutional expertise, advanced certifications, and bilingual support
- Virtual prep allows us to expand services to nonresidents — our very small Foreign Student team can collaborate remotely
- We store all the snacks in the same room :)

Pathways to Drop Off

We offer both the 100% virtual and hybrid processes



Drop Off Scenarios

Required

- Returns requiring Military, International, or Foreign Student certification
- Returns claiming education credits with no Form 1098-T (e.g. UTSA)
- State returns

Recommended

- Lengthy Forms 1099-B (or forms with adjustment to basis)
- Form 1099-S for sale of home
- Amendments that would take significant time (e.g. recreating original prepared elsewhere)
- Technical issues on site (e.g. TaxSlayer outage)
- Client preference

Drop Off Staffing

Full-Time and Seasonal Staff

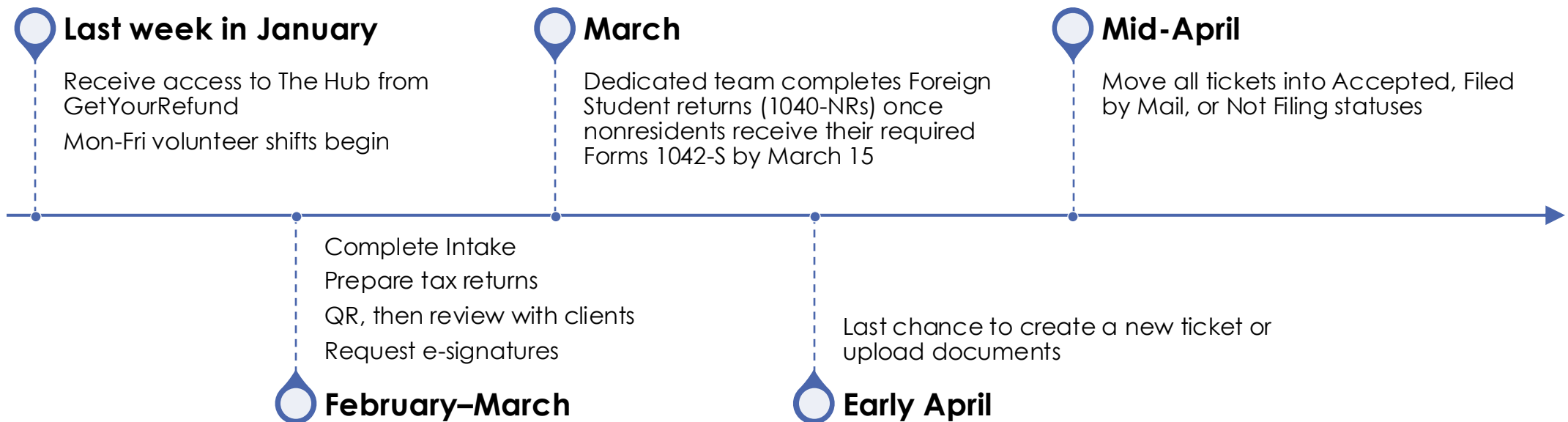
- Drop Off Managers (2)
- Bilingual Ticket Coordinator (1)

Volunteers

- Several years of VITA experience
- Mix of advanced certifications:
Military, International, Puerto Rico,
Foreign Student

2026 SEASON BY THE NUMBERS	
Full-Time Staff	3
Volunteers	9
Volunteer Hours	548
Number of Returns	700

Drop Off Timeline



Drop Off Checklist

- Designed in BlockSurvey (annual subscription)
- Dynamic checklist that confirms scope and asks required follow-up questions for returns that must come to Drop Off
- Reminds Client Liaisons to request or provide additional documentation as needed (e.g. Amendment Intake Checklist, Education Intake Checklist, FSS Questionnaire)
- Gathers state-specific information for clients who lived or worked in two or more states



Summer 2026 Drop Off Intake Checklist

First review the intake sheet with the client and ensure all questions are answered. Then complete this checklist to answer additional questions needed by the Drop Off team.

Client's first name *

This is the primary taxpayer - confirm which taxpayer is normally listed first (if filing a joint tax return).

Please enter your response

Client's last name *

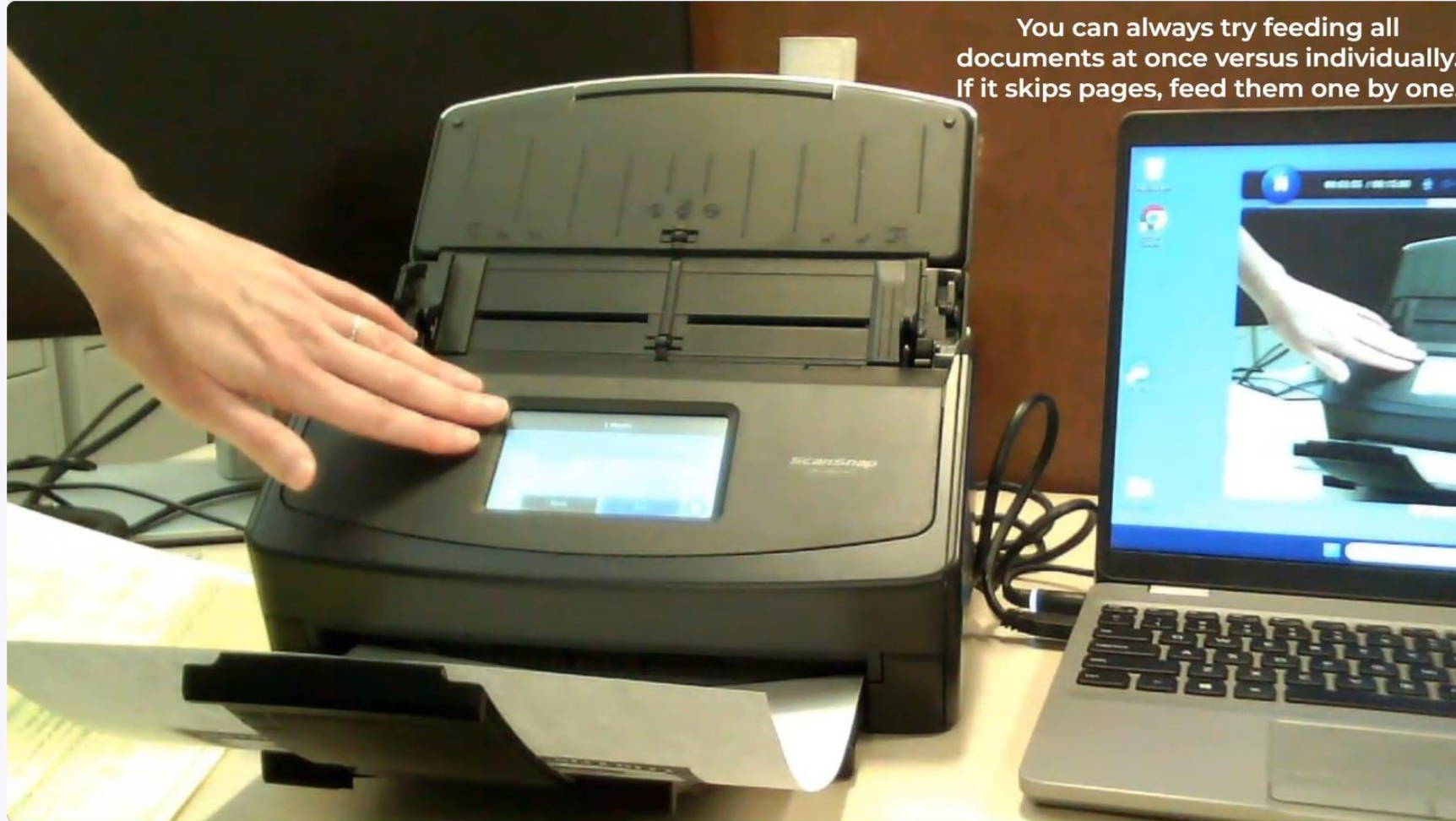
Please enter your response

Language spoken by client (if not English)

Please enter your response

Space to leave notes for the preparer

Example: Paper return because Married Filing Separately; taxpayer prefers to be called after 4pm weekdays; etc.



Chapters

-  Which Returns Must Be Drop Off?
0:02
-  Sample Taxpayer Intake Sheet
1:31
-  Drop Off Intake Checklist
9:42
-  Document Order for Scanning
23:41
-  How to Scan
35:19
-  Reviewing the Scan
38:33
-  Creating the Hub Ticket
44:01

Demo Video

Drop Off Challenges

- Volunteer pipeline.
- Steep learning curve for hybrid intake process.
- Retention — newcomers can only absorb so much training without repetition and context.
- Buy-in of the staff at the sites.
- How long the Checklist takes.
- Lack of modifier uniformity leading to late discovery of a necessary certification.
- Lack of familiarity with scanners.
- Late discovery of scope issues.
- User error with dedicated URLs.
- Playing phone and text tag.
- Reducing the load for staff at the in-person sites by taking on as many pick-ups as we can.
- Capacity — Drop Off used to do 1000 returns/season, down to 700 with added complexity.

Thank you

Catherine Cusick

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Q&A