

AARP Foundation Tax-Aide Intake Booklet – Tax Year 2019

The information gathered via the intake process helps us better understand those we serve as part of AARP Foundation and Tax-Aide missions to assist the 50+ low-income population. The information also helps identify other potential program needs that can further serve these individuals and enables us to report vital information to our sponsors and grantees, including IRS and AARP Foundation.

Intake Booklet Pages:

Pages 1-3: The first three pages are the IRS Intake/Interview sheet – Form 13614-C. IRS has added race/ethnicity demographic questions to page 3.

Page 4: This page includes AARP Foundation additional demographic questions, which are the same as last season, but without the race/ethnicity questions that are now included on the IRS form. This page also includes a reminder to taxpayers that they have an opportunity to save a portion of their refund.

Page 5: This page is guidance to the taxpayer about the Booklet and the meaning of the consents.

Pages 6-8: These are the three consent forms (further discussed below)—IRS carryforward form; the TaxSlayer form allowing the taxpayer to share their information with AARP Foundation; and the Foundation form for taxpayers to consent to receive information about free AARP Foundation programs. Note that all consents are “sign if you agree” rather than asking taxpayers to check Do or Do Not agree.

Discussion with Taxpayer:

If the consents are signed and questions answered when the Intake Booklet is handed to the preparer, no further discussion is needed. If one or more of the consent forms are not signed, please check with the taxpayer about his/her intent. Same with the demographic questions – if none are answered, please ask if they were simply overlooked or if it means “prefer not to answer” for all. The preparer should not assume no answers is the same as “prefer not to answer.” If the taxpayer simply decided to not answer the questions, “Did not answer” is the choice to select.

The normal Form 8879 *IRS e-file Signature Authorization* that the taxpayer (and spouse, if applicable) must sign to give permission to e-file the tax return is still required. In accordance with program policy, after the taxpayer’s consents and answers are entered in TaxSlayer, the Intake Booklet, along with Form 8879 and all other taxpayer documents, are returned to the taxpayer.

Joint Returns: Note that a joint return requires both taxpayer and spouse to agree to a consent for it to be considered accepted. If either does not sign a consent, then it is denied for both. If the spouse is not present while the return is being prepared, then all consents are

denied until one of them returns with the Intake Booklet with the consents they do accept signed by both.

Race/Ethnicity Questions: Answers to the race/ethnicity questions now appear in the IRS intake sheet. These questions are to be answered in TaxSlayer as Tax-Aide uses this vital statistical information to determine who we serve and to help gain resources for the program.

Consent Form Detail:

Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites. This consent provides the taxpayer with the option to visit a different site next year and have his/her basic data (name, address, dependents, payers, etc.) carried forward. Carryforward improves the efficiency and the accuracy of return preparation by providing a comparison of two year's basic information. The taxpayer should sign the form in order to have the basic information available at multiple locations so he or she can choose each year which site best fits his or her schedule or situation. This option offers the taxpayer the most flexibility. **If the taxpayer does not sign the form, there is no impact on return preparation this year and same site carryforward will be available next year.**

Consent to Disclose/Use Information to AARP Foundation. This consent is between the taxpayer and TaxSlayer, the software provider, allowing information to be shared with the program sponsor (AARP Foundation Tax-Aide); it also allows Tax-Aide to manage consistent custom questions used by all sites, collect the answers to these questions and obtain the information for taxpayers agreeing to obtain information from AARP Foundation per the following consent. **If the taxpayer does not sign the form, there is no impact on return preparation. If the taxpayer wishes to obtain information from AARP Foundation (see below), he/she will need to sign this consent.**

Consent for AARP Foundation to use select tax return information to provide you with additional information about other free AARP Foundation programs or services. AARP Foundation – the Tax-Aide sponsor – works to help 50+ low-income people improve their lives and has several valuable, free programs and services that help to build economic opportunity and social connectedness that may be of interest to the taxpayers we serve. These include efforts that foster financial resilience, provide job training for the 50+, offer intergenerational volunteer opportunities and empower older adults to stay in their homes and communities. (There is a Foundation Programs flyer with more information that can be downloaded from the Volunteer Portal.)

The taxpayer should sign this consent if he or she would like AARP Foundation to send information about programs and services that may be of benefit to him or her. AARP Foundation is legally structured as the charitable affiliate of AARP, serving the 50+ low-income population. Taxpayer data will not be shared with AARP or AARP's licensed service providers for the purposes of membership marketing or paid offers. **If the taxpayer does not sign the form, it will not affect the preparation of the return. However, if the taxpayer wishes to obtain information from AARP Foundation, he/she will need to sign the second consent too so TaxSlayer can release contact information to AARP Foundation Tax-Aide.**