

TAX-AIDE

Free tax assistance for those who need it most

Site Name: _____ State: _____ SIDN: _____

Name of Local Coordinator: _____

Name of Reviewer: _____ Title: _____

Date of Review: _____

Did all volunteers receive training on AARP Foundation Policies and Procedures? * Yes No

If using a public Wi-Fi access (wireless), is a Tax-Aide approved network setup or router being used? * Yes No

Instructions: Check the boxes below as they apply to this site – either Meets Standards (MS) or Needs Improvement (NI) [questions/sections marked with * are required, otherwise leave blank if not observed]. Please provide other observations in Section 5 and include additional information in Section 6 for any item checked Needs Improvement.

Section 1—Intake/Interview and Return Preparation*

MS NI

- Taxpayers asked to provide appropriate photo ID and SSN/ITIN documents.
- The Counselor interviews taxpayers with sufficient questions to clarify any issues and notes comments and any new or changed information on the Intake Sheet before return preparation is started.
- The Counselor asks “did you have any other income this year?”
- The Counselor enters taxpayer-supplied decisions and answers from Intake Booklet.
- The completed return is explained to the taxpayer and all questions are answered.

Section 2—Quality Review*

MS NI

- Quality review includes a thorough review of the Intake Sheet with the taxpayer.
- Any new or changed information learned during quality review is noted on the Intake Sheet.
- The quality reviewer asks “did you have any other income this year?”
- Taxpayers are advised that they are responsible for the accuracy and completeness of their return before they are asked to sign the Form 8879.
- The return is within Tax-Aide Scope.

Submit By April 30th

<https://www.surveymonkey.com/r/InternalSiteReviewsTY19>

Section 3—Privacy, Security, Confidentiality and Device Care

MS NI

- The site has adequate space for a waiting area that gives privacy for taxpayers getting returns done.
- Workstations are set up to protect taxpayer’s privacy and keep information confidential.
- All computers are password protected.
- Computer and TaxSlayer passwords are not posted or otherwise easily accessible.
- All Windows computers have current anti-virus definitions and Windows updates.
- Only Tax-Aide approved devices are used at the site.
- Only Tax-Aide approved devices are connected to the site network.

Section 4—Information at the site

MS NI

- The Local Coordinator has emergency contact information for all volunteers who are working at the site today.
- All volunteers are wearing the appropriate badge (first name and last initial only).
- All volunteers are appropriately certified.
- AARP Foundation Tax-Aide poster (D143) is posted at the first point of contact with the taxpayer in the tax preparation and/or waiting area.
- AARP Foundation Tax-Aide Scope poster (C2467) is available for review by taxpayers.
- AARP Foundation Tax-Aide document “Taxpayer Information and Responsibilities” is available for review by taxpayers.
- IRS Publications 17, 4012 and 4299 are available at the site as resources.

Section 5—Other Observations:

Please use this section to note other areas of concern that were not previously covered.

Section 6—Additional Information:

Please use this section to note 1) details for any box checked “Needs Improvement” 2) information on any additional recommendations made for the site, 3) Best practices found at the site that could be helpful for other sites. Attach additional sheets as necessary.

Submit By April 30th

<https://www.surveymonkey.com/r/InternalSiteReviewsTY19>