

AARP Foundation Tax-Aide 2022 Drop-Off Site Plan

This fillable pdf form can be completed using your Chromebook or any other computing device. Click in a text box and start typing. All text boxes will expand to allow additional space if needed. When complete, save the form and include the site name in the document title. If filling out on paper, add additional pages as needed.

A Drop-Off Site Plan (Site Plan) must be completed, approved, and receipt acknowledged by the AARP Foundation Tax-Aide (Tax-Aide) national staff **BEFORE** tax service can begin for the season. Each region's Regional Coordinator (RC) determines what leadership level is the "approver".

The Site Plan:

- Should be completed and signed by the Local Coordinator (LC).
- When complete is passed up the volunteer leadership chain for approval.
- Is reviewed at each level of leadership to assure that the Site Plan meets the requirements for approval. *(See Guidelines for Approval of Drop-Off Site Plans document)*
- Once approved will be distributed up through the RC to the Assistant National Director for national office acknowledgement and filing.

Site Name: (as it appears
in the Volunteer Portal)

SIDN:

Split State:

District:

Local Coordinator:
(Please Print)

Local Coordinator
Email Address:

1. **Please describe the secure storage set-up at your site:** (Access to storage must be limited, ideally just to AARP Foundation Tax-Aide site leadership, and largely unmovable. Refer to Drop-Off Site Requirement document in the Volunteer Portal Libraries for more details.)

2. **Which of these tax preparation processes will be used at your site?** (Check all that apply.)
 - Return Preparation and / or Quality Review will take place on-site.
 - Return Preparation and / or Quality Review will take place off-site.

3. **If documents will be transported off-site, please explain how the site has prepared for secure transfer and secure storage at off-site locations:** (Transferred documents must be delivered directly to/from the tax site to the tax preparation volunteer or Quality Reviewer and back. Off-site storage should adhere to the same principles as on-site storage – accessible only to Tax-Aide volunteers and largely unmovable, for example: a locking desk drawer or locking cabinet.)

Drop-Off Site Plan Approvals

By Signing below site leaders agree that all operations at the site will conform to the Drop-Off Site Requirements as listed in the Site Requirement Document available in the Volunteer Portal Libraries.

These Requirements include: (please check to show agreement)

- Follow all AARP Foundation Tax-Aide policies and procedures
- Meet all AARP Foundation Tax-Aide site requirements, including COVID-19 protocols
- Have this approved DROP-OFF SITE PLAN acknowledged and on file with the national office.
- Have secure storage on site
- Obtain a signed 14446 from every taxpayer
- Use the Drop-Off Inventory Checklist for every taxpayer
- Use the Drop-Off Site Activity Log

LC Signature:

Date:

**Approving
Leader
Signature:**

Role:

Tax-Aide

Acknowledgement of Receipt:

Date Filed: