

**AARP Foundation Tax-Aide**  
**ONE VISIT SCAN MODEL SCRIPTING**  
**Script: INTAKE Stage <sup>1</sup>**

1. Taxpayer contacts site requesting an appointment
  - a. Volunteer (any Tax-Aide Volunteer) explains the One Site Visit Scan preparation model to the Taxpayer. The **blue text** below is the required language to describe the model:

**You will have an appointment to come to the site. During the first appointment, we will ask you questions about your tax situation, have you fill out several forms, and convert all of your documents to electronic images. The electronic images are saved in the same IRS-provided software we use to prepare your tax return. Our Counselors will prepare your return remotely. You will be given a link to create a Customer Portal account within the tax software that is used to create your return; we can assist you in setting up your account. To finalize your return, we will contact you using Google Meet video conferencing to review your return and answer any questions you have. We will ask you to electronically sign a document giving us permission to e-file your tax return. We will help you use your Customer Portal account to enter your electronic signature. Once we have your permission, we will transmit the return to the IRS. You will be able to download a copy of your return using your Customer Portal account.**

2. **STOP POINT:** Does Taxpayer want to continue?
  - a. If NO,
    - i. Cannot assist taxpayer if this is the only model the site is using, mark this as a Q&A on the site's Activity Log
    - ii. Suggestions:
      1. Check other locations in the area
      2. Go to a paid preparer
  - b. If YES, give Taxpayer an intake appointment in accordance with site procedures
3. **[100, 110, 120, 125]** Taxpayer arrives for appointment
  - a. Volunteer (any Tax-Aide Volunteer) enters Taxpayer name on site's Activity Log per site procedures and explains 1 Site Visit Model to Taxpayer. **(Using language in blue text in item #1, above.)**
  - b. **STOP POINT:** Does Taxpayer want to continue?
    - i. If NO,
      1. We cannot assist taxpayer if this is the only model the site is using, mark this as a Q&A on the site's Activity Log

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<sup>1</sup> Throughout this document the numbers appearing in brackets [xxx] are references to numbered boxes on the 1 Visit Scan Model flow chart.

2. Suggestions:
    - a. Check other locations in the area
    - b. Go to paid preparer
  - ii. If YES, move to **[125]**, below
  - c. **[125]** Determine whether Taxpayer has the technology required to participate in this model:
    - i. Does the Taxpayer have the required equipment/technology, or access to it, and know how to use it or have someone to assist them
      1. Equipment (get specifics of what they have – computer/laptop/tablet/ smartphone<sup>2</sup>)
      2. Does their device have a working camera
      3. Does their device have a working microphone
      4. Do they have an email address that they can access
      5. Do they have access to a printer (optional to print out return but required if Taxpayer owes and must print payment voucher)
    - b. **STOP POINT:** Does Taxpayer have the required technology and ability to use it?
      - i. If NO: explain that we can't help them, if this is the only model the site is using, and mark them as a Q&A on the site's Activity Log
        1. Suggestions:
          - a. Check other locations in the area
          - b. Go to a paid preparer
      - i. If YES: Continue to **[140]** below
4. **[140]** Volunteer checks Taxpayer photo IDs and explains 14446
  - a. Present Taxpayer with the Form 14446 for the One Visit Scan Model. Explain the Form 14446 using the language in below in **blue text**

**IRS requires us to obtain your written consent to prepare your return without you present. This document explains how we will prepare your return. The last page contains two consents. The first is IRS' request to review your return for accuracy; IRS asks your permission to review your return as part of their random review of Tax-Aide site operations. You do not have to allow this review for us to prepare your return.**

**The second provides your consent for our IRS-certified volunteers to prepare your return using technology such as telephone, video conferences, email, and secure storage of electronic files containing your personally identifiable information. You and your spouse, if married filing a joint return, must grant this consent in order for us to assist you with your return.**

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<sup>2</sup> If taxpayer plans to use an iOS or Android device, they will not be able to join or participate in the required Google Meet video conference unless they have a Google (Gmail) account.

- i. Do you have any questions?
      1. If YES, answer questions and proceed
      2. If NO, please review and check the boxes on page 3 either Yes or No and sign the form. Taxpayer (and spouse, if applicable) must sign. If you are not willing to check YES for the second box and sign this form, we cannot assist you.
    - b. Have you filled out the Intake Booklet and other documents (if these were sent to Taxpayer prior to appointment)
      - i. If NO, please complete the Intake Booklet (and other documents required according to site practices)
      - ii. If YES, gather Taxpayer's documents and assign the Taxpayer to a Counselor in accordance with site practices
5. **[142, 143, 144, 145]** Intake interview, explain TaxSlayer Customer Portal, organize documents for scanning
  - a. A Counselor conducts an intake interview, making notes on the documents as needed and organizes the documents for scanning in accordance with site procedures
  - b. Explain TaxSlayer Customer Portal (in general terms). Explain purpose is to:
    - i. Electronically sign the return
    - ii. Retrieve your return
    - iii. Send/receive messages with Counselors working on your return
  - c. Confirm that Taxpayer has all documents needed for the return
    - i. If NO, handle per site practices
    - ii. If YES, proceed to the SCANNING stage

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**Script: SCANNING Stage**

1. **[200]** Scan Taxpayer documents into TSO Scans folder (See Tip Sheets #07 and #08)
2. **[210, 220]** Create the return in TaxSlayer, using information obtained during the intake interview to enter SSN, Filing Status, and complete the Basic Information screens; upload the scan files to the Taxpayer's return in TaxSlayer
3. **[230]** Before the Taxpayer departs site
  - a. I'm placing all of the documents you brought to us in this Taxpayer envelope, we do not need the documents because we have scanned everything
  - b. We will send you a link (by email or text per Taxpayer preference) to set up your TaxSlayer Customer Portal account. The email will come from "TaxStatusNow.com"; a text will come from "Taxofficemanagement.com". The Taxpayer envelope also contains instructions about setting up your Customer Portal account and using the account once it is set up. If you need assistance, contact us by calling **xxx-xxx-xxxx**.
  - c. The preparation and quality review process will be done remotely, counselors may contact you if they have any questions.
    - i. If necessary, they will contact you by phone or email. If by phone, the call may come from a private number or a number you do not recognize; please answer this type of call while we are working on your return. When you receive a call, ask the person calling for the pass code. The pass code will be **(enter the pass code set by your site's leadership)**. If the person does not know the pass code, do not continue speaking with them.
    - ii. If you are contacted by email, the email will come from an "aarpfoundation.org" address and will have "AARP Foundation Tax-Aide" in the subject line.
  - d. When your return is ready for your review, we will send you the return via your Customer Portal account; instructions explaining how to access the return are in the Taxpayer envelope. We will contact you to schedule a Google Meet video conference to finalize your return.
  - e. Taxpayer leaves site
  - f. Customer Portal link is sent to Taxpayer via email or text, depending on Taxpayer's request, according to the site's procedure.

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**Script: FINALIZING the Return**

1. Communication method: Phone call followed by Google Meet video conference<sup>3</sup>
2. Volunteer level: Counselor
3. **[500]** Call Taxpayer to make sure they are ready for Google Meet video conference
  - a. Was the meeting already set up?
    - i. If YES: Tell Taxpayer to use Google Meet link that was previously sent
    - ii. If NO: Call Taxpayer to see if Taxpayer is ready. If so, send Google Meet invite OR have them get on Google Meet site (meet.google.com) and give them the meeting code
4. **[510]** - Introduction:
  - a. This is the final review of your preliminary tax return for tax year \_\_\_\_\_.
  - b. Need xx time to discuss and you will need to log into your Customer Portal account
  - c. If applicable, is spouse there with the Taxpayer?
    - i. Yes, continue
    - ii. No,
      1. Reschedule when both are available OR
      2. Conduct review with Taxpayer and schedule separate review with spouse
    - iii. If no spouse, continue
  - d. Have Taxpayer log into their Customer Portal account
  - e. Have them locate, download, and view the return
    - i. Suggest Taxpayer rename the document on download; something like TYxx Prelim Return
    - ii. Possibly have them share their screen so you can see what Taxpayer sees
  - f. **[530]** If revisions are required to the return, Counselor must send the revised return to Taxpayer via their Customer Portal account before the return can be finalized
  - g. Go over the return and answer any questions
  - h. Direct Taxpayer to the Form 8879 after the return has been reviewed and after Taxpayer has approved it. The following **blue text** is required language to explain this form:

**This is IRS Form 8879, by signing it you are stating that:**

- **You have provided us with all of your TYxx documents;**
- **This return is complete and accurate to the best of your knowledge;**

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<sup>3</sup> Caution: Taxpayers using iOS or Android mobile device will not be able to join or participate in a Google Meet video conference unless they have a Google (Gmail) account.

- **You understand that this is your return and you are responsible for it;**
- **You are giving us permission to submit this tax return on your behalf;**

1. If Taxpayer agrees with the above statements, proceed to **[540]** below
  2. If Taxpayer does not agree with the above statement or is unwilling to sign, explain to them that we cannot e-file their return and they will have to go elsewhere, mark the Taxpayer as Q&A, place a note on the return that Taxpayer refused to sign the 8879, delete the scan files from TaxSlayer, and deactivate the return in TaxSlayer.
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5. **[540]** – Ask Taxpayer (and spouse, if applicable) to electronically sign the return documents, provide help if it is needed.
    - a. Optional, explain how to print return
    - b. Thank them for participating in this program
    - c. End Google Meet session
    - d. Complete log based on site procedure
  6. **[550, 560, 570, 580, 590]** Counselor marks return “ready to e-file”.
    - a. Return is transmitted in accordance with site’s process
    - b. Return is monitored for acceptance / rejection in accordance with site’s process