AARP FOUNDATION TAX-AIDE
No Site Visit Model
Suggested Best Practices[1]

Model Description: Taxpayers do not come to the site in the No Site Visit Model. A Counselor conducts a Google Meet video conference to obtain information needed to create the return in TaxSlayer (Filing Status and Basic Information) and sends Taxpayer a link to set up their TaxSlayer Customer Portal account. Taxpayer receives two emails containing all of the information they are required to have per IRS and all information we need to prepare the return.

Taxpayer scans their tax documents and other information and uploads the files to their return via their Customer Portal account. Our Counselors access the scan files in TaxSlayer and contact Taxpayer via a Google Meet video conference to conduct an intake interview.

Counselors prepare and quality review the return remotely. A Counselor uploads the preliminary return to the Taxpayer's Customer Portal account and contacts Taxpayer using Google Meet video conferencing to review the return, answers any Taxpayer questions, and obtains Taxpayer's electronic signature on the Form 8879. Counselor uploads the signed, final return to Taxpayer's Customer Portal account. The return is e-filed according to the site's usual practice.

GENERAL

Contacting taxpayers by phone:

- If volunteers will be contacting Taxpayers by phone, at the earliest point possible, provide taxpayers with a pass code that Taxpayers can use to identify authorized Tax-Aide callers.
- Provide Taxpayers the phone number that will show on their caller ID when volunteers contact them with questions (this may mean explaining that the number will show as "private" / "unidentified").
- Provide Taxpayers with the phone number used by the site, if one is available, and/or with the Google Meet phone number (617-674-4444).
- Suggest Taxpayers add the phone number(s) to their contacts list under Tax-Aide. This will allow the taxpayer to identify incoming calls from volunteers.
- If calling from a personal cell phone, volunteers should use **#67** to mask the phone number they are calling from.

Google Meet video conferencing:

- Google Meet video conferencing sessions are required throughout the No Site Visit Scan Model. Consider telephoning the taxpayer shortly before the Google Meet session to confirm the taxpayer is available and ready to begin the video conference.[2]

[1] Throughout this document, you will see numbers in brackets **[xxx]**. These numbers are cross references to the numbered boxes on the flow charts.

[2] Taxpayers who need to join/participate in a Google Meet video conference from an iOS or Android device must have a Google (Gmail) account to do so.

SETUP / SCREENING

[140] Before setting a Taxpayer's first appointment, ask screening questions to determine whether the Taxpayer has access to, and the ability to use, the technology required for the No Visit Scan Model. (See No Site Visit Scan Model Script document found in the Portal Libraries at Service Delivery Models/Scan Models/No Site Visit Model/Scripting)

[160] Create a flag "Waiting for TP upload" for Counselors to place on the return indicating that we are waiting for the Taxpayer to upload their documents. This will make it easier for a Counselor to identify these returns and monitor them for receipt of the Taxpayer's scan files.

[190] Consider creating a supplemental intake sheet to record needed information that may not be recorded elsewhere.

[190] Designate one or more individuals the responsibility of sending the two required emails (Tax Prep Information Email and Legal Information Email) and their attachments to Taxpayers using the No Site Visit Scan Model. This task can be handled by any Tax-Aide volunteer because no access to TaxSlayer is required. The volunteer responsible for sending these emails must regularly monitor their aarpfoundation.org Gmail account because Taxpayers may reply to these emails with questions. (The email templates are found in the Portal Libraries at Service Delivery Models/Scan Models/No Site Visit Model/Legal Info Email + Attachments and Tax Prep Info Email + Attachments)

INTAKE

[202] Designate a Counselor to monitor returns for receipt of Taxpayer scan files. There is no reporting available to monitor Taxpayer uploads. Consequently, monitoring must be done through the "Tools" menu on the Client Status List or by opening each return and checking the "Scanned Documents" area. Consider asking Taxpayers to email you when they have uploaded all of their documents. ***Caveat: Asking Taxpayers to notify you when their documents are uploaded will be of some help but it is not advisable to rely strictly on the Taxpayers notifying you in a timely manner, if at all.***

[202] Counselor monitoring for Taxpayer's uploaded documents should check the uploaded files to confirm they include a fully signed Form 14446.

PREPARE

[300] If the Counselor preparing the return is not the same person who created the return during intake, the preparer will not be able to exchange messages with the taxpayer through the Customer Portal. To allow the preparer to exchange messages with the Taxpayer, the site's administrator must change the preparer name in TaxSlayer. (See Tip Sheets #19 and #20, found in the Portal Libraries at Service Delivery Models/Scan Models/Tip Sheets)

[310] During the Google Meet intake interview, create a GoogleDoc to record notes to preserve information obtained verbally during the intake interview or to summarize details such as selfemployment expenses, qualified education expenses, or itemized deductions. The Notes function in TaxSlayer can also be used to preserve this information.

If using a GoogleDoc to record notes, print the GoogleDoc to a PDF file and upload it to the return in TaxSlayer with the Taxpayer's other scan files, delete the GoogleDoc from the Google Drive after it is uploaded, and "empty the trash" once the document has been uploaded (See Tip Sheets #13 and #15, found in the Portal Libraries at Service Delivery Models/Scan Models/Tip Sheets)

[310] Confirm that the filing status is correct. If in doubt, consult with another Counselor or contact the taxpayer for clarification. Do not assume that the filing status entered to create the return is correct.

[310] Confirm the information entered in the TaxSlayer Personal Information is correct. Also confirm any information entered in the Dependent screen.

[320] Do not hesitate to contact the Taxpayer if you have questions or need clarification.

[320] Use the TaxSlayer notes function to preserve information the quality reviewer may need to reference.

QUALITY REVIEW

[400] The Counselor quality reviewing the return will not be able to exchange messages with the Taxpayer through the Customer Portal unless they are designated as the "assigned preparer" in TaxSlayer. To allow the quality reviewer to exchange messages with the Taxpayer, the site's administrator must change the preparer name in TaxSlayer. (See Tip Sheets #19 and #20, found in the Portal Libraries at Service Delivery Models/Scan Models/Tip Sheets)

[420] Do not hesitate to contact the taxpayer if you have questions or need clarification.

[420] Use the TaxSlayer notes function to preserve information that may be needed in the future.

FINALIZE

[510] Taxpayer (and spouse, if applicable) should be present during the Google Meet video conference return review. This makes the final review process more efficient and eliminates delays incurred waiting to review the return with the spouse and obtain the spouse's signature on the Form 8879.