

Procedure for Assisting State Counselors State Tax Assistance Program – Tax Year 2021

Requesting Counselor emails the Assisting State Tax Assistance team:

- Using AARP Chromebook (Login xxxxxxxx@st-tax-assistance.org)
- Note the-out-of-state, type of return: resident, non-resident, part-year
- Phone number, best times can be reached (include time zone)
- When taxpayer returning to site

To protect taxpayer information, all participants use AARP Chromebooks and associated Google Applications including Google Meet.

1. Via email, the **Assisting Counselor** replies to the Requesting Counselor and copies the Assisting State STAP Lead (and fellow team members)
2. Assisting Counselor contacts Requesting Counselor either:
 - via phone to discuss the details of the state or local returns and any specific state intake information if required.
 - or optionally use AARP Chromebook and Google Meet

**Goal is connection between requester and assister
within 24 hours of first request for help**
3. If necessary, Requesting Counselor provides TaxSlayer login information and the Assisting Counselor logs in with the STAP Reviewer ID to access the state return
4. Discuss return by phone or Google Meet Event and agree on who will make any changes to return

Enlist a second quality reviewer if any significant inputs or changes are made to a STAP created state tax return by the Assisting Counselor.
5. Resolve return with Requesting Counselor
6. The Requesting Counselor and the local team must explain the state tax return to the taxpayer and witness their signature(s) to the Form 8879