

## Procedure for Requesting State Counselors State Tax Assistance Program – Tax Year 2021

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

1. Prepare federal and local state (if applicable) returns and initiate “other state” return in TaxSlayer
2. Log onto Portal>Libraries>Tax-Aide: Training and Tax Law>State Tax Assistance Program, check for a state Intake sheet to be filed in by the taxpayer. These are important to many states, but not all states have intake sheets.
3. Explain the STAP process to the taxpayer and schedule a return visit in a week or so.
4. Prepare a personal email (not with AARP Chromebook) to the assisting STAP team using [XX@st-tax-assistance.org](mailto:XX@st-tax-assistance.org) (substitute state 2 letters for XX)
5. Include “STAP” or “State Tax Assistance Program” in email subject line
6. *Always protect taxpayer information* - - - limit taxpayer and site identification to: first name, last 4 digits of SSN, and last 4 digits of SIDN
7. In body of email:
  - Provide your AARP Chromebook login ID: ([xxxxxxxx@aarpfoundation.org](mailto:xxxxxxxx@aarpfoundation.org))
  - Requesting State (your state) and the Assisting State
  - Type of Return – select: resident, non-resident, part-year return, or local tax
  - Requester (your) Phone # (to establish a dialog)
  - Best Time for the first telephone or Google Meet Event (with time zone)
  - Date taxpayer is expected to return (date and time)
8. Assisting Counselor will invite you to a tentative meeting with Google Calendar that includes their contact information and tentative time to review the situation and possible QR.
9. In the initial Google Meet Event or telephone conversation, review the state return and determine if Assisting Counselor QR is appropriate.
10. For Assisting Counselor QR, Site TaxSlayer Administrator creates a STAP Reviewer Security Template and adds “STAP Reviewer” User (xxxxSTAP/QR, xxxx=SIDN last 4) with Assister’s email address. Requesting Counselor provides the TaxSlayer login information over the phone.
11. Do not save any taxpayer information on a Chromebook or other device. Social media sessions are not recommended to discuss or review a tax return. Taxpayer information is only saved in the TaxSlayer return.
12. Resolve any Quality Review issues with Assisting Counselor
13. A local Quality Reviewer performs normal QR of Federal returns and data entry on any other - state return. Coordinate with Assisting Counselor to complete the “Other State” return and Quality Review.
14. Taxpayer signs Form 8879 and your site efiles the return.
15. Site TaxSlayer Administrator inactivates the STAP User.