

**State Tax Assistance Program  
Tax Year 2021  
Procedures for Requesting  
Counselors**

# Situation: Out-of-state tax return?

## Options:

Turn taxpayer away

Ignore out-of-state return

**(don't)**

Trust TaxSlayer

**(don't)**

Get help

# Volunteer Portal STAP Folder:

*Portal Libraries > Training and Tax Law >*

**D – State Tax Assistance Program:**



**STAP Participating states**

**State intake sheets - STAP**

**STAP - Procedure for Requesting Counselors**

**STAP - Procedure for Assisting Counselors**

**STAP State Lead Role**

# State Tax Assistance Program

Counselor emails [XX@st-tax-assistance.org](mailto:XX@st-tax-assistance.org)

Instruction in Volunteer Portal

Out-of-State Counselor responds

Counselors get together (phone or Google Meet)

# Secure Taxpayer Information

## Policies & Procedures

Compliant home network

AARP Chromebook or phone calls

Limit emails information

No recordings

## Requesting Counselor:

**Does other state participate in STAP**

**Check for state intake sheet**

**Interview taxpayer**

**Email [xx@st-tax-assistance.org](mailto:xx@st-tax-assistance.org)**

**Complete final quality review**

**File the return**

# **Assisting Counselor:**

**Responds to STAP email**

**Initial meeting**

**Assist - State preparation**

**QR TaxSlayer return**

# Requesters need to know

## STAP not instantaneous

## Follow Service Delivery procedures

# TaxSlayer access for out-of-state Counselor

**Activate STAP Reviewer Security Template:**

**Reusable User ID & Return Tag**

**xxxxSTAPyy, update email & password**

**Complete and inactivate User ID**

# Assisting state intake sheet

**Portal Libraries > ... > Intake Sheets - STAP**

**First name SSN/ last four only**

**All copies to taxpayer**

# Thank you for volunteering with

# AARP Foundation Tax-Aide