Site Changes – 2023 Tax Season

November 2022

Available Site Models

- Traditional In Person
- Drop Off
- ATP – Not offered in AZ
- 1 Visit Scan
- 2 Visit Scan
- No Visit Scan

What's Up with COVID Requirements?

- **All** Service Delivery Models are available
  - No longer subject to CDC guidelines
  - Subject to Local & Host requirements

- Documents & Forms will be updated
  - Form 14446 will be in portal/AZ website for printing
  - No longer required for Same Day Drop Off (TP remains at site)

- Volunteer vaccinations **NO LONGER REQUIRED**
  - Not necessary for volunteers or taxpayers

- COVID Self-Check is **NO LONGER REQUIRED**

- Volunteer Registration & Waiver are **NO LONGER REQUIRED**

What's Changed?

- Appointments are ~~required~~ recommended
- Form 14446 is required for In Person, Scan and some Drop Off sites
- Traditional In Person is BACK!
- Drop Off is ~~the same as~~ modified* from TY21
- TaxSlayer contract has been renewed -

Walk-In Sites Allowed in TY2022

- Remember to update Program Location record in Portal
- Change “Appointment Required” to “No”
- If site offers appointments and walk-ins, indicate in Locator Comments

Meeting AARP Foundation's 2021-2026 Strategic Plan

- Drop-Off was the most widely deployed model during the 2022 tax season
- AARP Tax-Aide incorporated the Drop Off model into its 2021-2026 Strategic Plan
- Our Goal: Expand utilization of the Drop-Off Model in Tax-Aide sites to increase service access to LI50+ taxpayers

Requirements for Drop-Off

- Select “Drop-Off” as a service type on the site’s Program Location record in the Volunteer Portal
- Use the Document Inventory Checklist for every taxpayer
- Have secure storage for retained taxpayer documents
- Implement an organization system for tracking taxpayer document envelopes

Drop-Off Model Changes

Site Plans

ELIMINATED

AARP Foundation Tax-Aide 2022 Drop-Off Si[illegible] Plan

This fillable pdf form can be completed using your Chromebook or any other computing device[illegible]ck [illegible] text b[illegible] and start typing. All text boxes will expand to allow additional space if needed. When complete, save the form and [illegible]e th[illegible]e name in the document title. If filling out on paper, add additional pages as needed.

A Drop-Off Site Plan (Site Plan) must be completed, approve[illegible] an[illegible]ceipt acknowledged by the AARP Foundation Tax-Aide (Tax-Aide) national staff **BEFORE** tax servi[illegible] can begin for the season. Each region's Regional Coordinator (RC) determines wha[illegible]hip level is the "approver".

The Site Plan:

- Should be completed and signed by th[illegible]dinator (LC).
- When complete is passed up the vo[illegible]unte[illegible]eadership chain for approval.
- Is reviewed at each level of leaders[illegible]to as[illegible]e that the Site Plan meets the requirements for approval. *(See Guidelines f[illegible]rov[illegible] Drop-Off Site Plans document)*
- Once approved will be dis[illegible]ibu[illegible]d [illegible]through the RC to the Assistant National Director for national office acknowle[illegible]nd filing.

Site Name: (as it appears in the Volunteer Portal)

SIDN: **Split State:** **District:**

Local Coordinato[illegible]
(Please Print)

Drop-Off Enhancements Based on Volunteer Feedback

IRS Form 14446

Same Day Drop Off Only

ELIMINATED!

Form **14446** (November 2021)

Department of the Treasury - Internal Revenue Service

Virtual VITA/TCE Taxpayer C

OMB Number 1545-2222

This form is required whenever the taxpayer's tax return is completed and/or qu … e-to-face environment. The site must explain to the taxpayer the process used to prepare the taxpayer's … must advise taxpayers of the associated risk of transferring their data from one site location to ano…

Part I - To be completed by the VITA/TCE site:

Site name

Site address *(street, city, state, zip code)*

Site identification num…

Site coordinator name

Site contact name

Site contact telephone number

This site is using the following Virtual VITA/TCE method(s) to prepare your tax return:

☒ **A. Drop Off Site:** This site uses a drop off process which includes the site maintaining personal identifiable information *(social security numbers, Form W-2, etc.)* to prepare the tax return at the same site but at a later time. In this process, you will come back to the same site for the quality review and/or signing the completed tax return. The site must explain the method it uses to contact you if additional information is needed.

Requirements for Drop-Off

Non-Counselors may transport Taxpayer Documents

- TA site may use non-Counselors to transport taxpayer document envelopes
- Taxpayer document envelope couriers
  - Must pass IRS Intake/Interview and Quality Review test
  - Must complete all other certifications for their position

Requirements for Drop-Off

Document Inventory Checklist

AARP Foundation Tax-Aide
2023 Drop-Off Document Inventory Checklist

This Drop-off Document Inventory Checklist ("checklist") must be used for every taxpayer that has their taxes prepared using the Drop-Off model. The two page checklist should be printed and firmly attached to the envelope holding the taxpayer's documents. DO NOT SEPARATE FROM DOCUMENT ENVELOPE until return is delivered to taxpayer.

Taxpayer Name (Last, First): ______________________ ***Tax Years Prepared:*** _______________ ***State Returns Prepared:*** ___________

FORMS (add as needed)	SSN*	ID*	I&I 13614-C	Voided Check (For Direct Deposit /Direct Debit)	Prior Yr Return	W-2	*1099*					COMMENTS
Initial Receipt (requires signatures on Page 2) Initials Date												
Reason for Access (Circle One) **I&I Prep QR Other [Specify]** Initials and Date												
Reason for Access (Circle One) **I&I Prep QR Other [Specify]** Initials and Date												
Reason for Access (Circle One)												

Client Facilitators may start page 1 while helping taxpayers with the Intake Booklet.

Requirements for Drop-Off

Document Inventory Checklist

- During intake, taxpayer and volunteer each sign once on page 2

Document Receipt and Document Destruction Disclosure
(Complete during 1st appt)

I confirm documents checked on the "Initial Receipt" row accurately reflect the documents I am leaving with Tax-Aide on:

I confirm that I will return to the Tax-Aide site on a Date and Time that is mutually determined to obtain my completed return and accept the delivery of the documents left in the possession of the Tax-Aide volunteers.

If I do not return, Tax-Aide will make a good faith effort to contact me to reschedule the tax return and document delivery.

If I do not respond, or I do not return to the site, I understand that:

1. *Tax-Aide will destroy all documents left in their possession*
2. *Tax-Aide will not retain or electronically file the tax return that they prepared*

Today's Date

Taxpayer Signature

Tax-Aide Confirmation:

Print Volunteer First Name + Last Initial

Enhancement

New Simplified Site Activity Log

AARP Foundation Tax-Aide Site Activity Log

	DO NOT REMOVE - REQUIRED FOR ALL SITES																		
Date(s) Site ID#	Paper Return Tracking				Activity Reporting				E-File Tracking					Drop-off Return Location of Documents Please insert date unless other entry is requested				Scan Model Return Please insert date	
Service Type: ____ In-person ____ Drop-off ____ One Visit Scan ____ Two Visit Scan ____ No Site Visit ____ Multiple Service Types Taxpayer Last Name, First Name(s)	Federal Return (Current Year)	Federal Return (Prior Year)	Federal Return (Amended)	State/Local **Only** Return	Question & Answer **Only**	Counselor's Initials	Quality Reviewer's Initials	Ready For Return to Taxpayer	Federal / State to be **e-filed**	8879 Signed by all Taxpayers	Federal Return Sent / Acknowledged	State Return Sent / Acknowledged	Local / Add'l State Return Sent / Acknowledged	Off-Site Preparation (Y or N)	Returned to Taxpayer	Shredded/Destroyed	Checklist Filed	Scan Files Uploaded to TaxSlayer TSO Scans Folder	Scans Deleted from Chromebook


Any
Questions

2023 COVID & Volunteer Registration and Waiver

November 2022

TY22 COVID Safety Protocols - Changes

This year's protocol: All sites follow your local guidelines (i.e., city, county, state) and site hosts guidance.

<u>**Changes**</u>
The following are no longer required; however, local guidelines may require any of these depending on circumstances.

- Vaccinations/Boosters
- Masks
- Counter Shields
- 6 Ft Distance
- PPE Supply Kits - (TA – will not order any additional supplies)

Can a site have stronger requirements?
Yes, but it must be applied consistently. Keep in mind that you still must follow local guidelines.

TY22 COVID Safety Protocols - Changes

Recommended to post

- A new AARP Foundation Tax-Aide COVID symptoms Sign
- Remove all CDC signs

If we receive updated language, we will post the new documents to the Volunteer Portal and inform volunteers when revised.

Positive Case Reporting

Positive COVID-19 Case Reporting for In-Person Activities. When an individual in attendance at an AARP hosted in-person activity reports a positive COVID-19 case within ten (10) days of the activity, the following steps should be taken:

- ***Contact Those Who Attended the Activity***. All staff, volunteers, vendors, facility representatives and attendees should be made aware **within 24 hours** the positive case (or cases) being reported from an individual who was present at the activity, **without disclosing the identity of the person or people who tested positive.**
- **Please complete and submit the Tax-Aide COVID Event Report Form within 24 hours** of becoming aware of the event. Email the completed form to TaxAideCOVID@aarp.org
- The COVID Event Report form is located in the Volunteer Portal Library folder "COVID Resources"
- Only designated Tax-Aide staff will receive the report submitted and will handle all cases with care as privacy is very important to everyone involved.


Any
Questions

SITE CHANGE REQUESTS

Site Change Request Reminder

The following changes require a submitted request:

- Opening a new site
- Re-opening a site
- Closing a site
- Moving a site
- Renaming a site
- Ad Hoc to regular OR Regular to Ad Hoc

All requests must be submitted by the ADS with cc to the DC

Site Coordinator Resource

The IRS maintains a website for Site Coordinators:

- Pub 17 – Your Federal Income Tax
- Pub 4491 - VITA/TCE Training Guide
- Pub 5101 – Intake/Interview & QR Training
- Fact Sheets
- Tip Sheets

Site Coordinator Corner

https://www.irs.gov/individuals/site-coordinator-corner

NEW PROGRAM LOCATION FIELDS

Tax-Aide Locator

How does the taxpayer find information about your TA Site?

Tax-Aide Site Locator

- AARP.org
    - Locate a site
    - Chatbox (text feature)

- Voice Response at 1-888-227-7669
- AARP Help Desk at 1-888-687-2277

To appear the **Location Record** in the AARP Portal must be:

1. ACTIVE
2. Open to Public

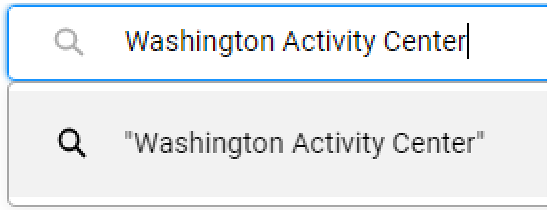
Live Mid-January until April 18th

Local Coordinators

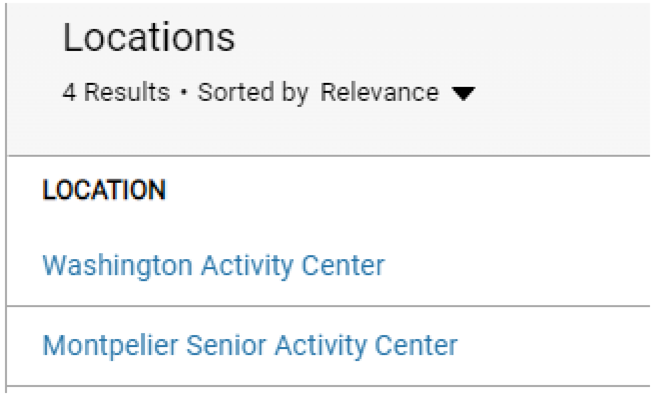
- LMS Location Record Training

Where in the AARP Portal is the Program Location?

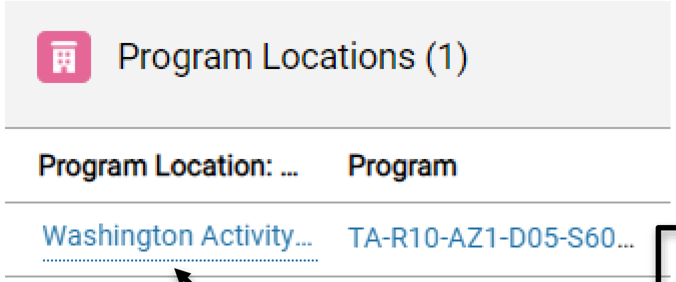
Three Easy Steps



1 – In the Portal "Search" box – enter the site name or SIDN



2 – In the Locations results – click on the site name

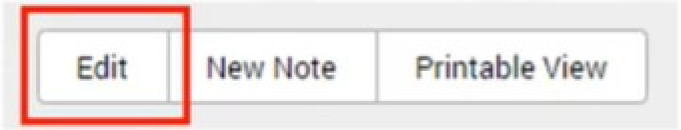


3 – In the Program Locations results – click on the site name

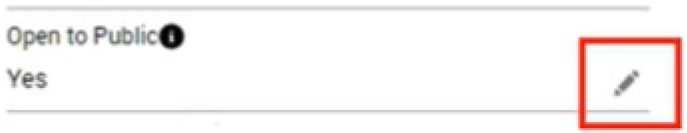
Edit Program Location Record

Two methods to Edit the information

- Use “EDIT” button in the Program Location page (right side)

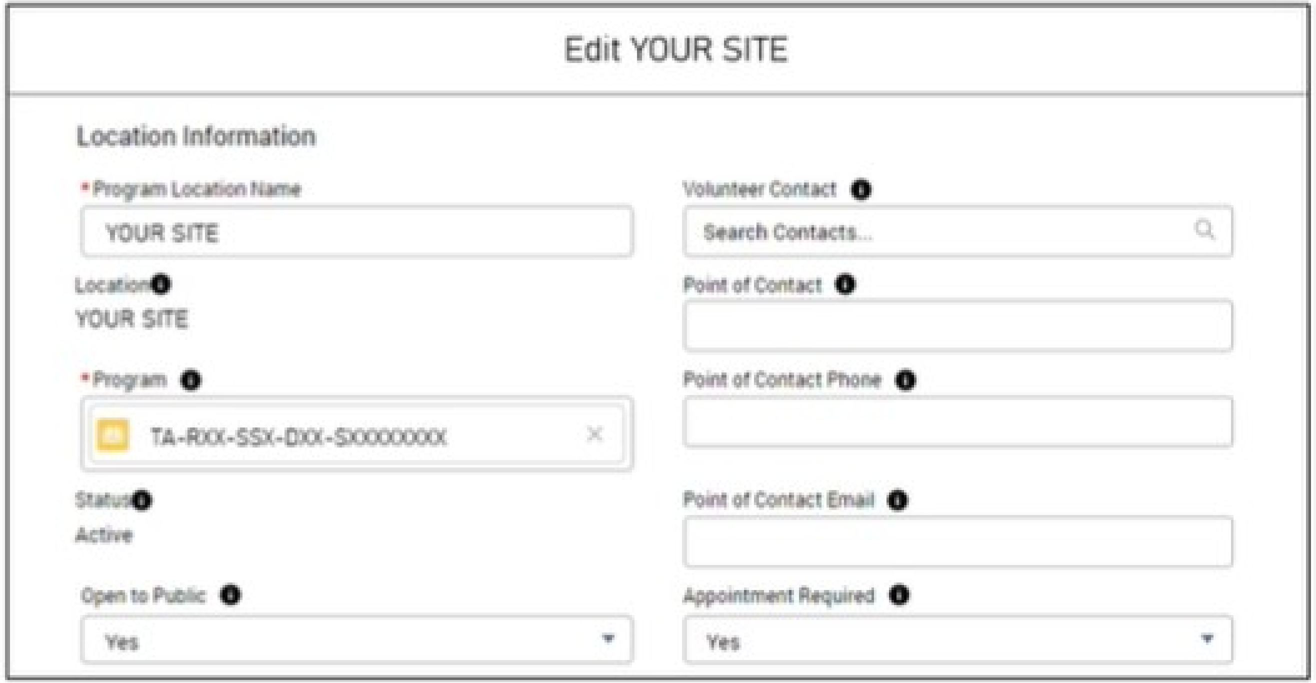


- Use the “Pen” that appears in each edit field



Location Information

- **Program Location Name, Location, Program** and **Status** fields cannot be edited by a volunteer – if a change is needed, contact your Administration Specialist.
- The **Volunteer Contact** and **Point of Contact Email** fields are optional. Fields not used by IRS or Tax-Aide Locator. May be useful for other volunteers.
- **Point of Contact** – Enter the name or job title (Receptionist, Librarian, etc.) of the person accepting appointments. Required for sites that accept appointments for IRS compliance. Not listed on Tax-Aide Locator.
- **Point of Contact Phone** – Phone number listed on Tax-Aide Locator when site is open to public. Enter only a 10-digit number. Phone numbers with extensions should be placed in the **Locator**



Location Information

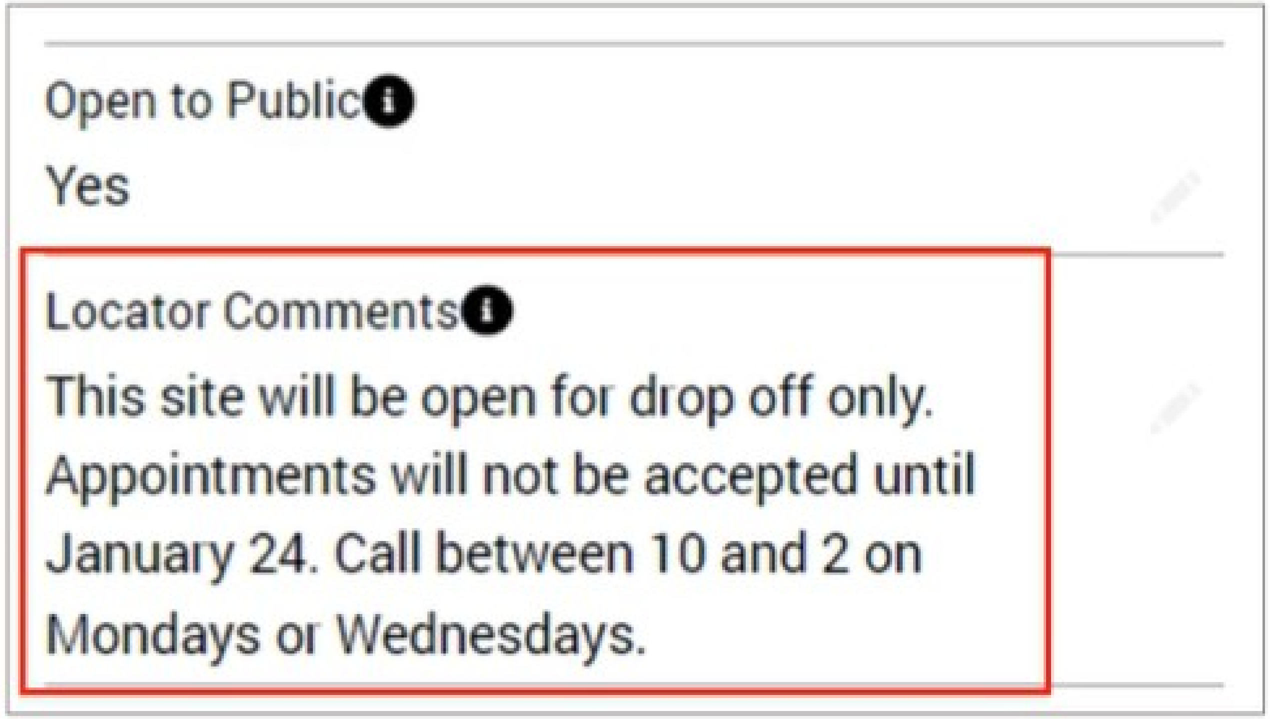
- **Open to Public** – Select Yes or No to indicate whether the site will be displayed in the Tax-Aide Locator.
- **Appointment Required** – Select Yes or No to indicate whether the site requires appointments. If this is an appointment site that also accepts walk-ins, indicate in **Locator Comments**.
- **Locator Comments** – Any additional information about the site's schedule, procedures and other site-specific instructions. Limited to 256 characters.
- **Languages** – English is pre-selected from the language list. Languages can be added or removed using the multi-select picklist.

Appointment Required, Languages and **Locator Comments** will display on Tax-Aide Locator when site is open to public.

Location Information

Locator Comments

- Listed on Tax-Aide Locator internet and phone systems to provide more detailed information about site to taxpayers.
- Interactive Voice Response uses computerized voice to read the Locator Comments out loud.
- Do not use abbreviations or acronyms of any kind.
- Keep brief and to the point. No need to repeat address, phone number, hours.



Location Information

Service Type

- Select each service type offered at your site.
- Your site may offer more than one service type.
- At least one **Service Type** or **Intake and Preparation at Separate Locations** selection required for IRS compliance.
- Selected service type(s) listed on Tax-Aide Locator when site is open to public.

Location Information

Intake and Preparation at Separate Locations

Intake and Preparation at Separate Locations

Preparation at Separate Location
☐

Intake Site
☐

- Used only when returns are scanned at one tax site and prepared at another tax site. The intake site will have a different SIDN than the preparation site and will typically be an ad hoc site that does not have its own EFIN.
- Information used for IRS reporting and not listed on Tax-Aide Locator.
- **Preparation at Separate Location** – Select for the site that prepares the return.
- **Intake Site** – Select for the site that scans the return.
- If a site only prepares returns without intake, **Open to Public** should be set to No.

Site Information

New fields correspond to IRS Form 13715 and appropriate fields for each site need to be selected for IRS compliance.

Site Information

- [ ] Mobile Only Site
- [ ] Prior Year Returns
- [ ] Certifying Acceptance Agent(CAA) Service
- [ ] Alterı
- Addit
- [ ] Voter Registration Assistance
- [ ] Financial Education and Asset Building
- [ ] Non-Resident Alien Student Returns
- [ ] Form 15272, VITA/TCE Security Plan
- [ ] Federal E-File
- [ ] State E-File

Site Information

- **Mobile Only Site** – Select for one day only site, a bus or other mobile operation.
- **Prior Year Returns** – Select if site prepares returns from previous tax seasons.
- **Certifying Acceptance Agent (CAA) Service** – Select if site can assist individuals who do not qualify for a Social Security Number to obtain an Individual Taxpayer Identification Number.

Site Information

Voter Registration Assistance

Financial Education and Asset Building

Non-Resident Alien Student Returns

Form 15272, VITA/TCE Security Plan

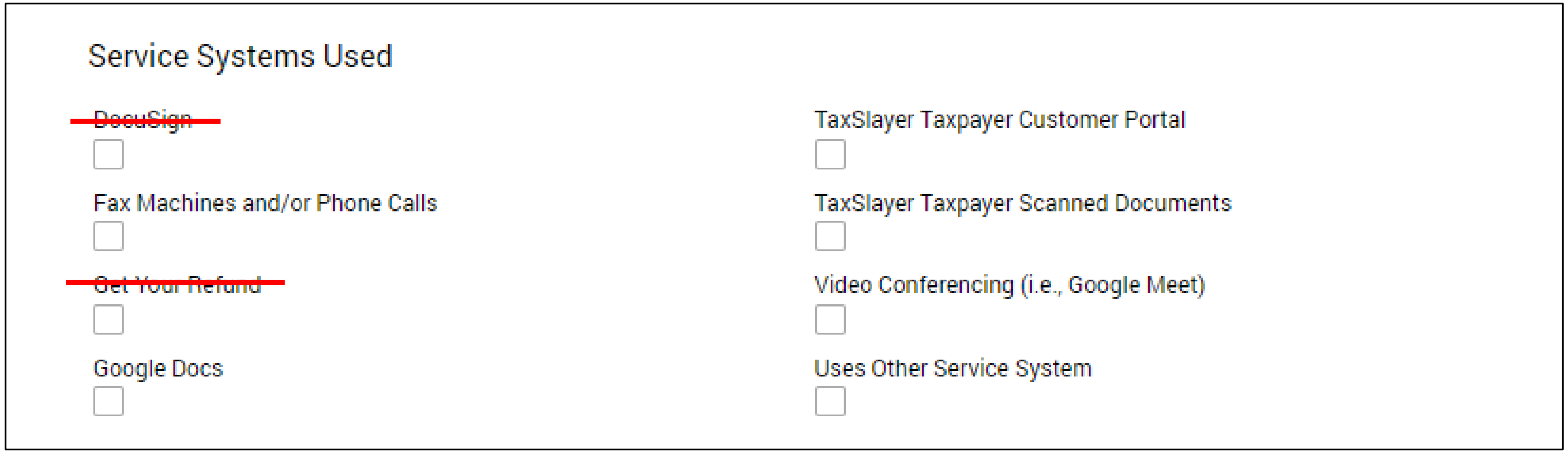
Federal E-File

State E-File

- **Voter Registration Assistance** – Select if Tax-Aide volunteers assist with voter registration.
- **Financial Education and Asset Building** – Select if site offers any opportunities described in IRS Publication 4867. Common opportunities include Direct Deposit, US Savings Bonds and Split Refunds using IRS Form 8888.
- **Non-Resident Alien Student Returns** – Select if site can prepare returns for foreign students who have not established US residency.
- **Form 15272, VITA/TCE Security Plan** – Select if IRS Form 15272 has been filled out for site. Should be selected by all sites.
- **Federal E-File** – Should be selected by all sites.
- **State E-File** – Select if site offers state e-file services.

Service Systems Used

Select applicable fields to indicate the service systems used to support virtual return preparation for your site. Fields correspond to IRS Form 13715 and information is required to be entered accurately for IRS compliance.



Service Systems Used

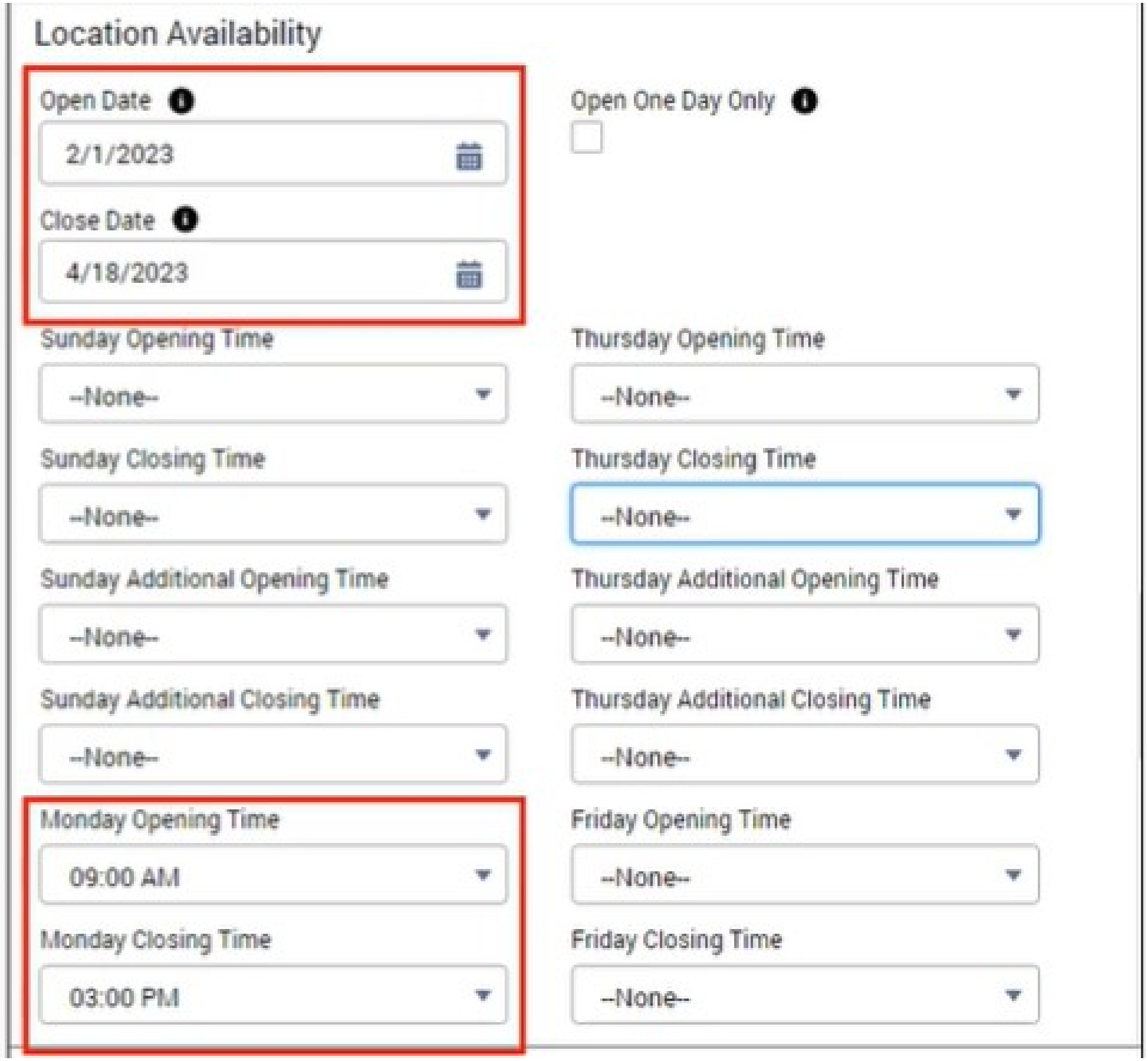
~~DocuSign~~ ☐
Fax Machines and/or Phone Calls ☐
~~Get Your Refund~~ ☐
Google Docs ☐
TaxSlayer Taxpayer Customer Portal ☐
TaxSlayer Taxpayer Scanned Documents ☐
Video Conferencing (i.e., Google Meet) ☐
Uses Other Service System ☐

- Tax-Aide currently does not use **DocuSign** or **Get Your Refund** in tax preparation process. Fields should not be selected.
- **Fax Machines and/or Phone Calls** – Select if fax or phone call used in tax preparation process.
- **Google Docs** – Select if Google Docs or Google Drive is used for the tax preparation process.
- **TaxSlayer Taxpayer Customer Portal** – Select if taxpayers at your site can access the TaxSlayer Customer Portal.
- **TaxSlayer Taxpayer Scanned Documents** – Select if TaxSlayer is used as a repository for storing taxpayer documents at your site.
- **Video Conferencing (i.e., Google Meet)** – Select if site uses Google Meet in tax preparation process.
- **Uses Other Service System** – Select if any other technological tools not otherwise described used in tax preparation process.

Tax-Aide Site Availability - Finally

Location Availability

- **Open Date** and **Close Date** are entered with the first day and last day of the tax season by default. Edit dates if planned operating dates are different. Fields should not be blank. If site is not operating, contact your Administration Specialist.
- Operating Hours need to be entered for each day of the week that site is open using the **Opening Time** and **Closing Time** for the corresponding day.
- If site closes for lunch, list as the **Closing Time** and use **Additional Opening Time** and **Additional Closing Time** when the site re-opens.
- If no **Opening Time** and **Closing Time** are entered, site will not appear on Tax-Aide Locator.
- Exceptions to weekly schedule should be noted in **Locator Comments**. (every other week, holidays, etc.)
- Don't forget to click **Save** when you are finished editing the Program Location record.



VP07- Update Program Location Information
VP07 – Manage a Site Locator Entry

Ask: Geofrey Wolfe or Michelle Kaplan