

Tax-Aide Sites – Required Materials & Ordering Information

Required Hard Copy at Tax-Aide Site – order from Volunteer Portal

Item Title	Portal Order Code	Typical Orders *
AARP Free Tax Help Poster (D143)	D143 En, D16179 Sp	1-2 per site
Tax-Aide Scope Poster	C2467	1-2 per site
Taxpayer Information and Responsibilities	D20232 En/Sp	1-2 per site
AARP Intake Booklet (package of 50) **	D20444 En, D20445 Sp	Number of returns
AARP Tax Record Envelope (each) **	D12225 En, D17464 Sp	Number of returns
Tax-Aide Name Tag Sheet (6 per sheet)	C2358	Each volunteer
Plastic Name Tag Holder (each)	C1055	Each volunteer
Other Items Available in Volunteer Portal		
COVID-19 Acknowledgement Entry Sign	Libraries → Tax-Aide: COVID Resources	Print & Post at entrance to TA Site (not Host Facility)
Drop-Off Model – 2023 Drop-Off Document Inventory Checklist (each return)	Libraries → Tax-Aide: Service Delivery Models → 2022 Drop-Off Model	Page 2 Consent signature REQUIRED as written. Page 1 Inventory list, site may modify to unique needs
Scan Models – Form 14446 (each return)	Libraries → Tax-Aide: Service Delivery Models → 2022 Scan Models	Download & Print Form 14446 for model in use.

** Do Not Use the IRS Version

Useful (but not required) at Tax-Aide Site – order from Volunteer Portal

Item Title	Portal Order Code	Typical Orders *
Tax-Aide Table Tent	C3133	Per Table / Station
Site Activity Log (sign-in sheet) (12 entries per sheet)	D19597	Multiple sheets per session. Other recording options are acceptable
Tax-Aide shirts (volunteer, leader)	Multiple	Each volunteer
Tax-Aide Mouse Pad	C3181	Each Station, replace when dirty

Required Electronic Copy at Tax-Aide Site

Item Title	Source, also available on CORE cotaxaide.org
NTTC Pub 4012 **	Volunteer Portal
IRS Pub 17	Irs.gov
IRS Pub 4299	Irs.gov
DR0104 Colorado Income Tax Booklet	https://tax.colorado.gov/
Tax-Aide CyberTax messages	AARP distributes via email https://www.irs.gov/individuals/quality-and-tax-alerts-for-irs-volunteer-programs
Emergency Response plan & checklist	Unique to each site, see AARP Tax-Aide Policy Manual, section 7.7 for guidance
Form 15272 VITA/TCE Security Plan – use appropriate one(s) for Site Delivery Model(s)	Libraries → Tax-Aide Service Deliver Models → Form 15272 Templates

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