

State Tax Assistance Program

Procedures for Requesting Counselors

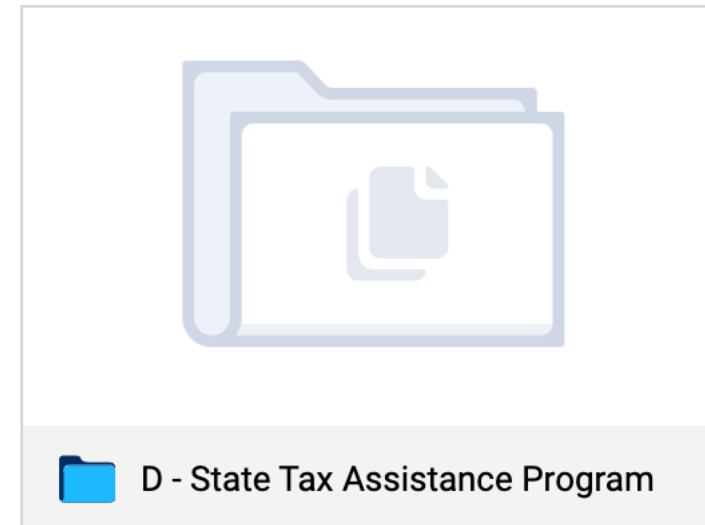
FOR USE BY AARP FOUNDATION TAX-AIDE VOLUNTEERS ONLY

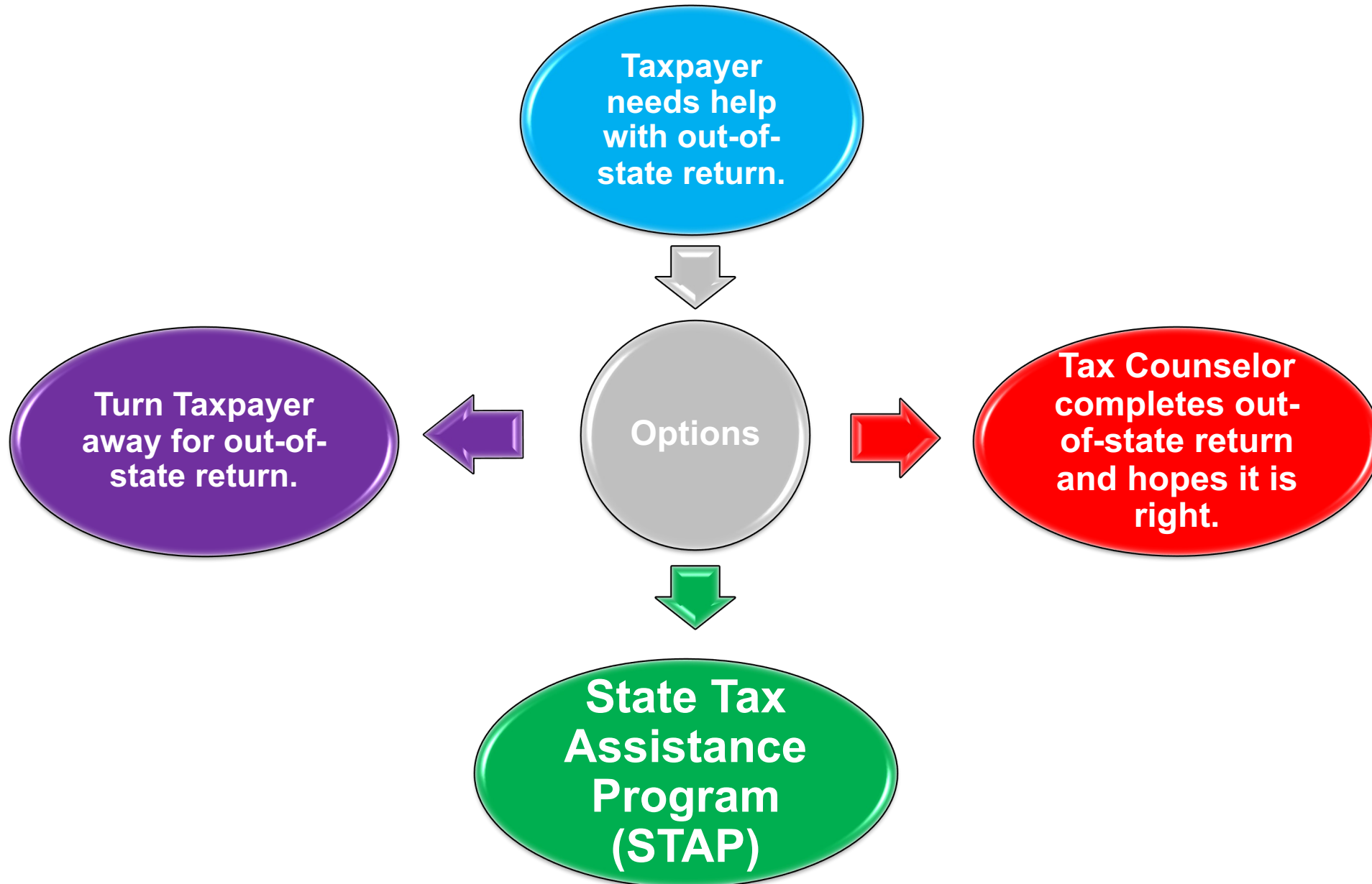


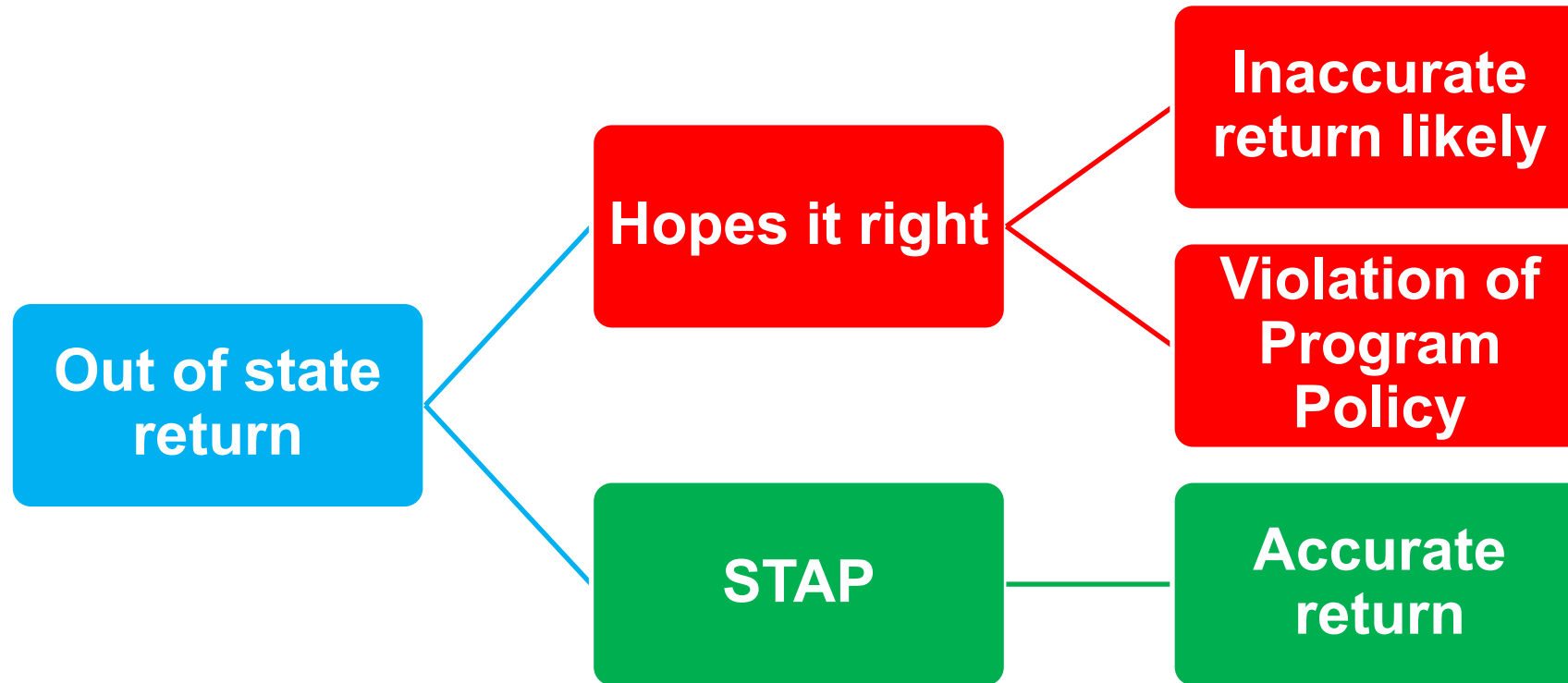
STAP Documents

- **Requesting Counselor STAP Process**
- **Assisting Counselor STAP Process**
- **STAP Participating States**
- **State Intake Sheets - STAP**

Portal Libraries > Training and Tax Law > D – State Tax Assistance Program:



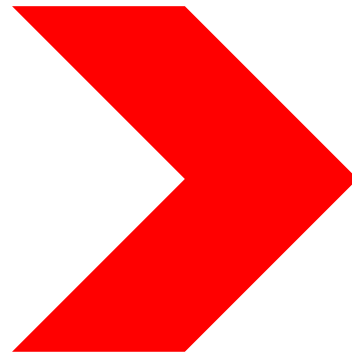




Volunteers who knowingly prepare returns with federal or state tax topics or forms that are out of scope or on which they have not been trained are subject to counseling and may be removed from the program for failure to follow program policy.

Requesting Counselor

- **Does other state participate in STAP**
 - **Check for state intake sheet**
- **Interview taxpayer**
- **Type of return**
 - **Resident**
 - **Non-resident**
 - **Part-year resident**



Assisting State determines types of returns they will do.

Requesting Counselor Process

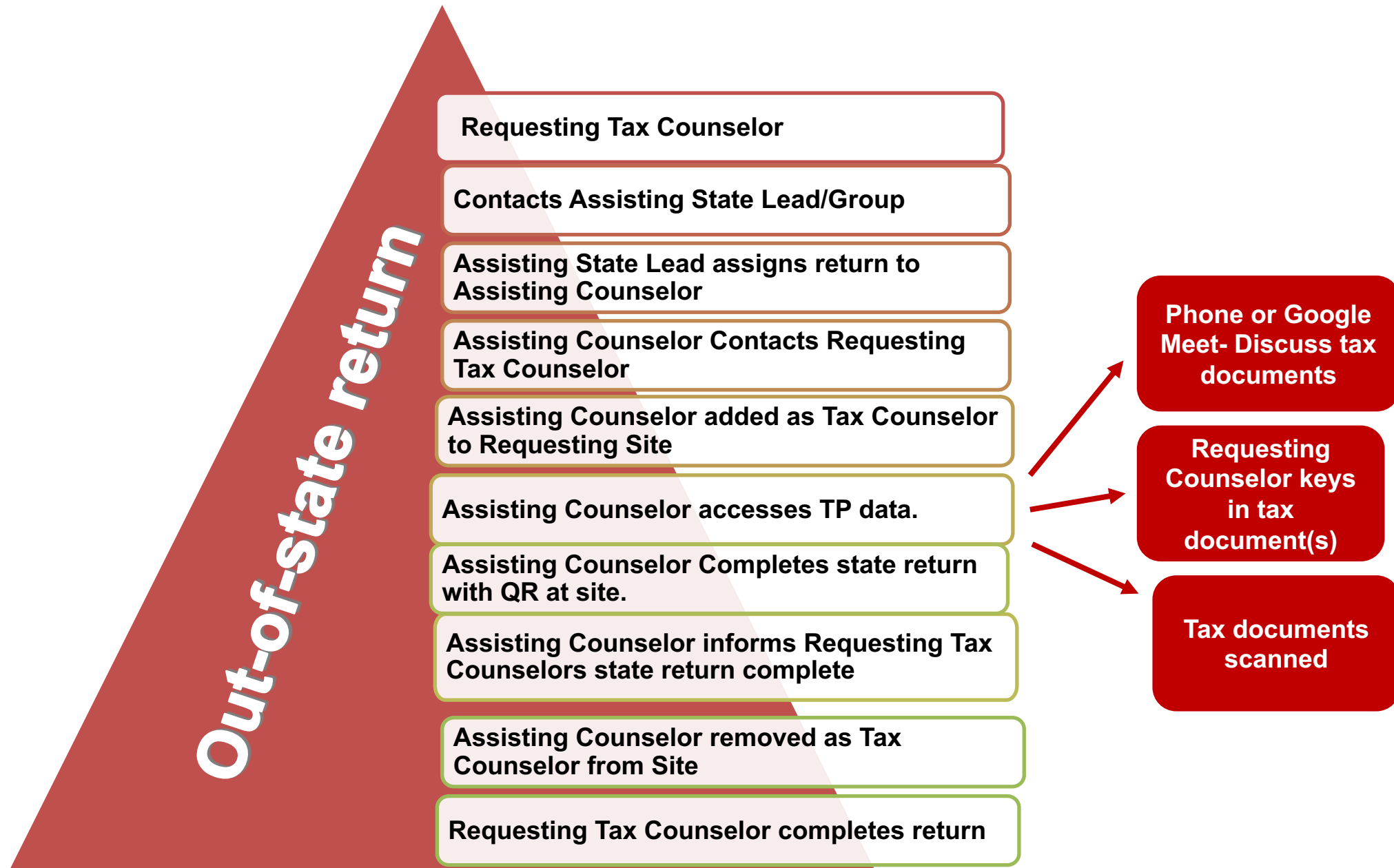
- **Emails Assisting Counselor Lead (XX@st-tax-assistance.org)**
- **Counselors meet by phone or Google Meet.**
- **Counselors decide how taxpayer documents will be entered in TaxSlayer.**

Requesting Counselor

- **Arranges for Assisting Counselor to be added as a tax counselor at the site.**
- **Taxpayer documents scanned at Requesting Counselor site.**
- **Requesting Counselor keys in data.**
- **Assisting Counselor keys in data during phone/Google Meet contact.**

Requesting Counselor

- **Receives message from Assisting Counselor that return is complete.**
- **Arranges for Assisting Counselor to be removed as a tax counselor at the site.**
- **Meets with taxpayer.**
- **Return is filed.**



Secure Taxpayer Information

- **Policies & Procedures**
- **AARP Foundation Chromebook**
- **Compliant home network**
- **Limit information shared in emails**
- **No recording or use social media**

- **Thank you for being a
STAP Volunteer**