



Client Service Provider Digest of Tax-Aide

2016-2017

AARP Foundation[®]

Table of Contents

<u>INTRODUCTION.....</u>	<u>2</u>
<u>AARP FOUNDATION TAX-AIDE ORGANIZATION</u>	<u>3</u>
<u>TAX-AIDE ORGANIZATION CHART</u>	<u>6</u>
<u>AARP FOUNDATION TAX-AIDE VOLUNTEER POSITIONS- GENERAL GUIDELINES AND POLICIES FOR ALL CLIENT SERVICE PROVIDER POSITIONS</u>	<u>6</u>
<u>FINANCIAL GUIDELINES.....</u>	<u>8</u>
<u>CONFIDENTIALITY AND SECURITY OF TAXPAYER DATA SUMMARY</u>	<u>8</u>
<u>AARP FOUNDATION TAX-AIDE POSITION DESCRIPTIONS</u>	<u>10</u>
<u>COUNSELOR (COU)</u>	<u>10</u>
<u>SHIFT COORDINATOR (SCO)</u>	<u>12</u>
<u>CLIENT FACILITATOR (CF)</u>	<u>14</u>
<u>ELECTRONIC RETURN ORIGINATOR (ERO)</u>	<u>16</u>
<u>TAX-AIDE PROGRAM ADMINISTRATION</u>	<u>18</u>
<u>SITE GUIDELINES</u>	<u>18</u>
<u>EXPENSE REIMBURSEMENT</u>	<u>21</u>
<u>INSURANCE COVERAGE</u>	<u>23</u>
<u>STANDARDS OF PROFESSIONALISM</u>	<u>25</u>
<u>TAXPAYER INFORMATION AND RESPONSIBILITIES</u>	<u>28</u>
<u>CONFIDENTIALITY AND SECURITY OF TAXPAYER DATA</u>	<u>30</u>
<u>DATA SECURITY</u>	<u>30</u>
<u>PHYSICAL SECURITY</u>	<u>32</u>
<u>REPORTING A LOSS OF TAXPAYER DATA.....</u>	<u>33</u>
<u>VOLUNTEER ASSESSMENT.....</u>	<u>34</u>
<u>VOLUNTEER PORTAL</u>	<u>36</u>
<u>VOLUNTEER PORTAL- DIRECT DEPOSIT.....</u>	<u>37</u>
<u>VOLUNTEER PORTAL- ACCESSING ONESUPPORT HELP CENTER (OSHC).....</u>	<u>40</u>

INTRODUCTION

Welcome to another season of AARP Foundation Tax-Aide! About 35,000 volunteers serve taxpayers each year, making the Tax-Aide program the largest of its kind in the nation. Thank you for being a part of this special program. We assisted over 2.7 million taxpayers last year.

This ***Client Service Provider Digest*** is intended for Counselors (COU), Client Facilitators (CF), Shift Coordinators (SCO), and Electronic Return Originators (ERO); it will provide you basic information about the policies and procedures of the AARP Foundation Tax-Aide program as well as descriptions for these four volunteer assignment positions. More detailed information is available on the OneSupport Help Center (OSHC) in the Portal (volunteers.aarp.org) and in your training including the Volunteer Policies and Procedures Training. Client Facilitators in particular should look for a manual dedicated to them which describes their position in detail. Further information about the policies and procedures in this digest are detailed in documentation in the OSHC > General Program Management > General section in the *Policy and Procedures Manual*. Your volunteer supervisor should have provided the Volunteer Standards of Conduct training/test, and a Volunteer Policies and Procedures Presentation as part of your training. They are important resources for you as well.

About AARP Foundation

AARP Foundation works to ensure that low-income older adults have nutritious food, safe and affordable housing, a steady income, and strong and sustaining social bonds. We collaborate with individuals and organizations who share our commitment to innovation and our passion for problem-solving. Supported by vigorous legal advocacy, we create and advance effective solutions that help struggling older adults transform their lives. AARP Foundation is the charitable affiliate of AARP. Learn more at aarpfoundation.org.

About AARP

AARP is a nonprofit, nonpartisan organization, with a membership of nearly 38 million, that helps people turn their goals and dreams into real possibilities, strengthens communities and fights for the issues that matter most to families such as healthcare, employment and income security, retirement planning, affordable utilities and protection from financial abuse. We advocate for individuals in the marketplace by selecting products and services of high quality and value to carry the AARP name as well as help our members obtain discounts on a wide range of products, travel, and services. A trusted source for lifestyle tips, news and educational information, AARP produces AARP The Magazine, the world's largest circulation magazine; AARP Bulletin; www.aarp.org; AARP TV & Radio; AARP Books; and AARP en Español, a Spanish-language website addressing the interests and needs of Hispanics. AARP does not endorse candidates for public office or make contributions to political campaigns or candidates. The AARP Foundation is an affiliated charity that provides security, protection, and empowerment to older persons in need with support from thousands of volunteers, donors, and sponsors. AARP has staffed offices in all 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands. Learn more at www.aarp.org.

AARP FOUNDATION TAX-AIDE ORGANIZATION

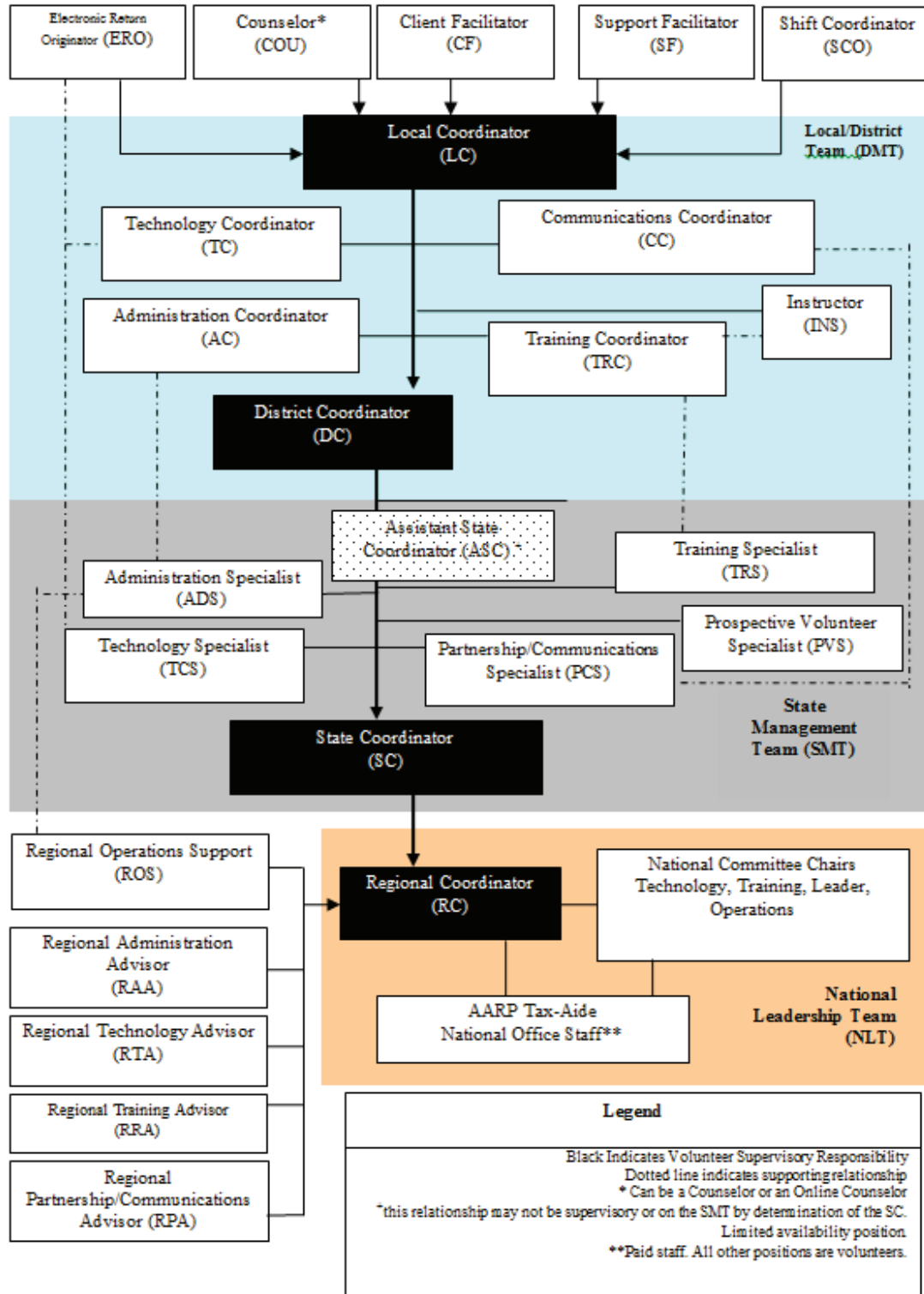
Value Proposition	Giving peace of mind and economic benefits to taxpayers, families, communities, and partners, AARP Foundation Tax-Aide's knowledgeable volunteers deliver free, high quality tax services.
Who We Are	AARP Foundation Tax-Aide is the nation's largest volunteer-run tax assistance and preparation service, preparing tax returns and answering tax questions free of charge. AARP Foundation Tax-Aide is offered in conjunction with the IRS.
Where We Serve Our Taxpayers	Most taxpayers receive in-person assistance at over 5,000 sites nationwide. Free electronic income tax filing is offered at all sites. Sites are located in malls, libraries, banks, senior centers, and other convenient facilities.
How Many Volunteers	Approximately 35,000 volunteers make up AARP Foundation Tax-Aide. Nearly all volunteers provide tax assistance, and 7,600 are also volunteer leaders.
Program and Structure and Administration	AARP Foundation Tax-Aide is a nationwide, volunteer-run program. Regional and state volunteer leaders share in setting policies, while also assuming most supervisory and operational responsibilities. <i>Counselors</i> provide all service-level tax assistance. <i>Electronic Return Originators (EROs)</i> manage the tasks related to e-filing the tax return. <i>Client Facilitators</i> provide a first point of contact for taxpayers and keep service orderly and efficient. <i>Instructors</i> provide tax training to Counselors. <i>Shift Coordinators</i> and <i>Local Coordinators</i> provide site leadership.
Coordinator and Specialist Roles	<p>Coordinators, in general, recruit and supervise volunteers at all levels. <i>Shift Coordinators (SCOs)</i> assist in managing the sites while they are open. <i>Local Coordinators (LCs)</i> manage assigned site(s), ensuring site compliance with program policy, program metrics, and may be responsible for Counselor reimbursement, volunteer recruitment and training, volunteer certification, site creation, database accuracy, and other activities.</p> <p><i>District Coordinators (DCs)</i> manage activity at the district level and recruit and supervise Local Coordinators. <i>State Coordinators (SCs)</i> oversee all state activities and set state operation policies.</p> <p><i>Administration Coordinators (ACs)</i>, <i>Communication Coordinators (CCs)</i>, <i>Technology Coordinators (TCs)</i>, and <i>Training Coordinators (TRCs)</i> support their specialty interests at the local level.</p>

	<p><i>Specialists</i> support administration, partnerships and communications, technology, prospective volunteers, and training needs at the state level. Regional advisors assist the Regional Coordinators in their areas of expertise. <i>Regional Operations Supports (ROS)</i> serve as an advisor and support state, regional, and national needs for the Volunteer Portal.</p> <p><i>Regional Coordinators (RCs)</i> guide and supervise State Coordinators and serve on the <i>National Leadership Team (NLT)</i>.</p>
National Leadership Team and National Office Staff	<p>The National Leadership Team (NLT), consisting of volunteer Regional Coordinators, National Committee Chairs, and select National Office staff, develops and implements AARP Foundation Tax-Aide goals and objectives.</p> <p>National committees support the areas of leader development, operations, technology, and tax law training. National staff members coordinate program policies, maintain relationships with the IRS and other key partners, support volunteer leaders, and collect and report program impact, costs, and other data.</p>
Electronic Filing	AARP Foundation Tax-Aide offers free electronic income tax filing at all sites nationwide, using IRS-provided tax-preparation software.
Internet Tax Assistance	<p>Since 1998, AARP Foundation Tax-Aide has had a 24-hour year-round internet tax assistance service at its website (www.aarp.org/taxaide).</p> <p>Taxpayers can pose questions online and get quality-reviewed answers back within a few business days. Volunteers interested in participating in this service can sign up through the application in the Volunteer Portal.</p>
Website Features	Located at www.aarp.org/taxaide , our website is a source of information about tax assistance, frequently asked tax questions, tax-preparation site locations, and other program information. Information on AARP Foundation Tax-Aide volunteer opportunities is also available on the website.
How to Volunteer via web	Interested persons can visit the Volunteer Opportunity Board on AARP.org. Volunteer positions are available for many opportunities including: tax preparation, technical support, communications, training, administrative support, and leadership.
Volunteer Leadership Positions	Tax training and certification is encouraged, but it is not required for many leadership positions. Leadership position descriptions are provided in the OSHC > General Program Management > Position Descriptions section.

Volunteer Policy	AARP Foundation volunteers will receive equal opportunity and treatment throughout recruitment, appointment, training, and service. There will be no discrimination based on, but not limited to, race, nationality, gender, disability, sexual orientation, gender identity, or religion. This policy applies to all volunteers.
-------------------------	---

TAX-AIDE ORGANIZATION CHART

(The reporting structure on this chart flows down from those critical volunteers serving taxpayers.)



AARP FOUNDATION TAX-AIDE VOLUNTEER POSITIONS- GENERAL GUIDELINES AND POLICIES FOR ALL CLIENT SERVICE PROVIDER POSITIONS

Purpose of Program	AARP Foundation Tax-Aide provides free income tax assistance and preparation to low- and moderate-income taxpayers, with special attention to those age 50 and older.
Volunteer Standards of Conduct	All volunteers must take and pass the IRS-developed Volunteer Standards of Conduct training and test in order to participate in the AARP Foundation Tax-Aide Program. They must also agree to these standards by signing the Volunteer Standards of Conduct form.
Certification	<p>In order to be certified to provide tax assistance, all volunteers, in addition to fulfilling the Standards of Conduct requirements, must attend appropriate training classes.</p> <p>Details of these requirements are found under the specific position descriptions. Counselors and EROs also must pass the IRS provided Intake & Interview/Quality Review test and test in tax law at the advanced level and complete the required practice problems in order to hold those positions. In addition to the Standards of Conduct test Client Facilitators must pass the Intake & Interview /Quality Review test.</p>
Length of Service and Eligibility	AARP Foundation Tax-Aide volunteers are certified for one year, and contingent upon satisfactory annual review, may be re-certified in subsequent years. The tax season runs from late January through April 15, or through October 15 if assisting taxpayers after April 15 with questions about previously filed tax returns. A few Tax-Aide sites continue to offer services for an extended period and are able to assist in filing late tax returns.
Non-discrimination	Volunteers must work well with diverse populations and always treat taxpayers, other volunteers and staff with respect and courtesy, regardless of, but not limited to their race, nationality, gender, disability, sexual orientation, gender identity or religion.
Program Promotion	Volunteers should support and promote the program through word-of-mouth, not only to advertise the tax-preparation service, but to recruit new volunteers.
Available Resources	Volunteers will be provided with the resources necessary to fulfill their responsibilities, including 16 to 36 or more hour training classes, printed reference materials, and online information sources. AARP

Foundation Tax-Aide provides limited supplemental insurance coverage and reimbursement for covered travel expenses. See specific sections of this digest for details on these topics.

Adherence to Program Policies	All volunteers are expected to adhere to program policies and procedures, including tax preparation scope and site guidelines, confidentiality requirements, and the IRS Volunteer Standards of Conduct and the AARP Standards of Professionalism. A copy of the Tax-Aide Standards of Professionalism is provided later in this digest.
--------------------------------------	--

FINANCIAL GUIDELINES

Not Accepting Compensation	Volunteers must not accept any compensation for the performance of their duties. Compensation includes fees, gratuities, or other dispensations to volunteers or to members of the volunteer's immediate family or household.
-----------------------------------	---

Personal Financial Gain	Volunteers must never solicit any business from taxpayers they assist or use the knowledge they have gained about taxpayers for any direct or indirect benefit for themselves or any other specific individual or business.
--------------------------------	---

CONFIDENTIALITY AND SECURITY OF TAXPAYER DATA SUMMARY

Maintaining the confidentiality and security of taxpayer data is given the highest priority.

General guidelines for volunteers are below; further guidelines, for tax-preparation sites, are found under the "Site Guidelines" section. For additional details, see the section of this Digest that outlines program confidentiality and security policies on page 29.

Standards of Conduct	All AARP Foundation Tax-Aide volunteers must sign the IRS Standards of Conduct agreement (IRS Form 13615), which contains provisions on confidentiality. Outside program personnel acting in the scope of their role as an employee or volunteer of a partner organization are subject to those organization's policies rather than those of Tax-Aide. However, the security and confidentiality standards of Tax-Aide are required of all partner organization participants.
-----------------------------	---

Taxpayer Documents	All returns must be prepared in the presence of the taxpayer, and all taxpayer records, including the Interview and Intake sheets must be returned to the taxpayer at the end of the assistance session.
---------------------------	---

Volunteers will not keep any forms or documents with taxpayer identifying information other than name and contact number.

**Preparing
the Return**

Volunteers must provide tax-preparation assistance in a manner that promotes confidentiality for the taxpayer. Care should be taken in how information is communicated; conversations should be held discreetly, so they cannot be overheard by others. Personal taxpayer information and documents should not be left where others might see them. If a Counselor needs to leave the work area during a tax-assistance session, the computer display screen should be minimized and the application closed down.

**“Need to
Know”**

Information provided for tax return preparation must not be shared with anyone who does not have a need to know. Individuals have a need to know when their involvement is required at any stage of tax return preparation to accurately complete or process a tax return or to respond to questions about the tax return. It is acceptable, for instance, to share information to obtain guidance from another volunteer in properly completing a return, to conduct a quality review, or to transmit a completed tax return. **It is not acceptable to share information with others, even with other volunteers, if their involvement with the tax return preparation is not required.** For instance, sharing information about income, birth dates, or the marital status of taxpayers with other volunteers, taxpayers, family, or friends is not permitted.

AARP FOUNDATION TAX-AIDE POSITION DESCRIPTIONS

COUNSELOR (COU)

Purpose of Position

Counselors, under the direction of the Local Coordinator or Shift Coordinator, provide tax assistance and preparation service to taxpayers.

Responsibilities of Position

- In accordance with the policies and procedures of the AARP Foundation Tax-Aide program, the Counselor:
- Prepares tax forms and/or answers questions to the extent of his/her current tax training and certification, at assigned tax assistance sites
- Reviews tax returns prepared with taxpayers since taxpayers are responsible for the accuracy of the return
- Adheres to site schedules and guidelines
- Accepts no money or other gratuity for services
- Maintains the strict confidentiality and protects the security of all taxpayer information and records at all times
- Adheres to program policies and procedures especially the IRS Volunteer Standards of Conduct and the Counselor Guidelines and Confidentiality and Security of Taxpayer Data sections in the Client Service Provider Digest and the AARP Foundation Standards of Professionalism.
- Promotes and supports the program through word-of-mouth and wears an AARP Foundation Tax-Aide name badge while serving at a site.
- Records assistance given and Quality Review completed as directed by the Local Coordinator

Qualifications

Counselors must pass the IRS Voluntary Standards of Conduct (VSOC) test, the Intake/Interview and Quality Review test and the Advanced level of the IRS test to be certified by the IRS for the purpose of providing tax assistance in this program and agree to by signing it, the IRS Volunteer Standards of Conduct (IRS Form 13615).

Time, Training, and Travel Typically, Counselors are required to volunteer at least an average of four hours a week during the tax season, usually from late January to April 15, plus 16-36 or more hours of training in December or January. Counselors acquire tax knowledge through attendance at Counselor class and may also use the online training course. Counselors must also be trained in program policy and to properly record assistance given on the activity log. Counselors travel locally to training and sites.

Appointment, Supervision, and Scope of Authority Counselors are appointed annually. They are assigned to sites by the District or Local Coordinator after IRS certification and program policy and administrative training sessions are completed. Counselors report directly to the Local Coordinator and do not supervise any other volunteer. Experienced Counselors may be assigned to mentor new Counselors.

Working Relations and Progress Review Counselors work closely with taxpayers, Electronic Return Originators (EROs) when e-filing, and their Local Coordinator. Local Coordinators evaluate Counselors on an on-going basis and provide feedback.

SHIFT COORDINATOR (SCO)

Purpose of Position

Under the direction of the Local Coordinator, the Shift Coordinator (SCO) is responsible for coordinating and managing all phases of site operations at a specific site during an assigned period of time (shift) acting for the Local Coordinator (LC).

Responsibilities of Position

In accordance with the policies and procedures of the AARP Foundation Tax-Aide program, the Shift Coordinator (SCO):

- Manages site operations for a specific shift, including physical setup, following local and district policies
- Complies with the Quality Site Requirements
- Manages the activities of the Counselors, Client Facilitators, and ERO assigned to the shift. Arranges for substitutes as needed
- Oversees the flow of taxpayers to Counselors considering the difficulty of the return and the experience of the Counselor
- Provides or directs other Counselors to provide quality reviews for all returns
- Reports issues/problems to Local Coordinator
- Ensures that all program data security procedures are followed
- Ensures that completed and quality reviewed returns are promptly identified to the ERO and transmitted in accordance with the schedule established by the Local Coordinator
- Ensures that all taxpayer material is properly secured, during the shift as well as at the end of the shift
- Ensures that equipment is properly secured and that host-provided equipment has been arranged or stored as agreed upon at the end of the shift
- Completes the Site Activity Log as directed by the Local Coordinator
- Advises the Local Coordinator of the need for supplies for future shifts
- Reports equipment problems and status to the Local Coordinator
- Adheres to program policies and procedures especially the IRS Volunteer Standards of Conduct and the Counselor Guidelines and Confidentiality and Security of Taxpayer Data sections in the *Client Service Provider Digest* and the *AARP Foundation Standards of Professionalism*

Qualifications	The Shift Coordinator must have the ability to implement program policy and provide direct oversight of the program and its volunteers at a site. SCOs should be an experienced Counselor, and experience as an ERO is most desirable. The SCO must have passed the IRS certification exam and signed the IRS Volunteer Standards of Conduct form.
Time, Training, & Travel	The position requires major effort during the tax filing season, late January to April. Sometime will be required prior to the start of the season for management training. The SCO must acquire a current knowledge of operational and administrative procedures associated with the program as provided by the National Office, DC, and LC.
Appointment and Supervision, & Scope of Authority	The SCO is appointed annually by the Local Coordinator with the concurrence of the District Coordinator and reports directly to the Local Coordinator. The SCO assists the LC in matters relating to the operation of the site and manages the activities of the ERO, Counselors, and Client Facilitators assigned to their shift. The LC remains the supervisor of all volunteers assigned to a site.
Working Relations & Progress Review	The SCO works closely with the Local Coordinator and with members of the district staff as needed. The SCO's performance is monitored on an ongoing basis and reviewed annually by the Local Coordinator.

CLIENT FACILITATOR (CF)

Purpose of Position

The Client Facilitator (CF) works with the Local Coordinator/Shift Coordinator (LC/SCO) and performs receptionist-type duties providing an important first contact for taxpayers and keeping service orderly and efficient.

Responsibilities of Position

In accordance with by the policies and procedures of the AARP Foundation Tax-Aide Program, a CF:

- Welcomes taxpayers and ensures they are helped in an appropriate order and checked off an appointment log or sequenced on the activity log to be assisted by a Counselor
- Helps ensure that each taxpayer has brought correct forms, documents, and personal identification required to accurately complete their tax return
- Determines, with assistance of a site Counselor, when a taxpayer's return is outside of AARP Foundation Tax-Aide scope
- Assists taxpayers in filling out portions of the Intake Sheet and other required papers. The CF may not address tax questions (unless also certified as a Counselor)
- Keeps information (such as waiting time) flowing to taxpayers who are in the waiting area
- Ensures appropriate production data is entered on the site activity log by the Counselor/quality reviewer as each taxpayer departs, and before another taxpayer is served
- May assist Counselors and the ERO in maintaining an orderly file system of incoming taxpayers and acknowledged or rejected returns
- Distributes any appropriate literature to taxpayers
- Adheres to program policies and procedures including those outlined in the Program Policies and Procedures presentation available on the OSHC and the IRS Volunteer Standards of Conduct

Qualifications	The CF must receive annual training on program policies and procedures, pass the IRS Standards of Conduct test, and agree to it by signing, the IRS Volunteer Standards of Conduct form. The CF must also be organized, personable, and enjoy working with people. The CF will need skill in dealing with taxpayers that want immediate answers to their tax questions but will sometimes be required to wait for answers from a tax Counselor.
Time, Training, and Travel	The position is appointed annually and runs during the tax season from late January through April 15th. An average of at least one shift each week is typical during this period. A typical shift takes four to five hours.
Training Required	Training by the LC will be required to become familiar with program policy, administrative matters such as site activity logs and Intake and Quality Review Form, applicable site procedures, and orientation to the program.
Travel Required	The CF will not be required to travel except to work at the assigned sites.
Appointment, Supervision, and Scope of Authority	The CF is appointed and reports directly to the LC and does not supervise any other volunteer position.
Working Relations and Progress Review	The CF maintains a close working relationship with the LC/SCO and the tax Counselors working at the site. The LC monitors the CF's performance on an on-going basis and provides feedback.

Note: In December 2013, a *Client Facilitator Manual* was introduced to help fully train volunteers in the Client Facilitator role. Please refer to the OSHC > General Program Management > General for an electronic copy.

ELECTRONIC RETURN ORIGINATOR (ERO)

Purpose of Position

The Electronic Return Originator (ERO) works with the Local/Shift Coordinator (LC/SCO), the Technology Coordinator (TC), and the Counselors to electronically file federal and state tax returns with the IRS and state Departments of Revenue via IRS- provided tax preparation software and the software provider.

Responsibilities of Position

In accordance with the policies and procedures of the AARP Foundation Tax-Aide Program, an ERO:

- Follows a designated process to ensure all completed and only quality reviewed e-file returns are transmitted within three days of creation to the Electronic Filing Center (includes state e-files)
- Assures IRS/state e-file acceptance/acknowledgements or rejection
- Assures rejected e-file returns are resolved timely
- Assures that 100% of returns are either e-filed/accepted, paper returns, or otherwise accounted for so that no return remains unresolved at the end of the season
- Provides reports as requested by the DC/TC or TCS
- Provides ongoing support to Counselors preparing e-file eligible returns by answering questions and addressing anomalies that occur during electronic filing procedures. Communicates problems to LC and/or TC for resolution
- Complies with the Confidentiality and Security of Taxpayer data policies, including deleting all returns off computers by April 30. This document is included in the *Client Service Provider Digest, Policy and Procedures Manual*, and is on the OSHC
- Adheres to program policies and procedures especially the IRS Volunteer Standards of Conduct and the Counselor Guidelines and Confidentiality and Security of Taxpayer Data sections in the *Client Service Provider Digest* and the *AARP Foundation Standards of Professionalism*.

Qualifications	ERO must have a working knowledge of personal computers, software, and electronic communication systems. ERO must pass the required sections of the IRS certification exam and sign the IRS Volunteer Standards of Conduct form to qualify as a Counselor and become proficient with the IRS supplied tax preparation software.
Term of Service and Eligibility	ERO is appointed for a one-year term and, upon satisfactory annual review and continued Counselor certification, may be re-appointed for subsequent one year terms. ERO is eligible for other AARP or AARP Foundation volunteer positions.
Time, Training, and Travel	The position is most active during late January through April. ERO must acquire knowledge of tax law (for reject resolution), electronic filing procedures, including software and hardware issues, as well as an orientation to the AARP Foundation Tax-Aide program. ERO assists in the implementation and operation of district e-filing sites and attends meetings as necessary. The ERO may be required to travel to several tax sites.
Appointment and Supervision, and Scope of Authority	LC appoints the EROs with the concurrence of the DC. The ERO reports directly to the LC. ERO assists the LC and any SCO in all matters concerning the electronic filing of federal and state tax returns at assigned site(s).
Working Relations and Progress Review	EROs maintains a close working relationship with the LC, any SCO, Counselors, TC, and software provider for the electronic filing of federal and state tax returns. The ERO's performance is monitored by the LC with feedback from the district's TC.

TAX-AIDE PROGRAM ADMINISTRATION

SITE GUIDELINES

Taxpayers Served	AARP Foundation Tax-Aide provides free tax assistance to taxpayers with low- and moderate-income, with special attention to individuals age 50 and older. Taxpayers will be served with courtesy and confidentiality, regardless of, but not limited to their race, nationality, gender, disability, sexual orientation, gender identity or religion.
Location	All tax assistance, except for rare home/shut-in visits must be performed at the site. Sites must not be located at individual volunteers' home, and volunteers must not prepare returns at the homes of taxpayers (except for home/shut-in visits and then only as directed by the LC and in accordance with state guidance on home visits/shut-ins).
Required Publications	All sites must have the following documents at the site for volunteer use: IRS Pubs 17 and 4012, any appropriate state tax instructions, and the Taxpayer Information and Responsibilities document, as well as AARP Foundation Tax-Aide CyberTax messages identified as "IRS Volunteer Quality Requirement or Tax Alerts." Reference documents may be in electronic form.
Confidentiality and Security	Volunteers must maintain strict confidentiality and security of all taxpayer information and records at all times. Sites must be set up in a manner that minimizes the likelihood that others can hear taxpayer conversations or see taxpayer data on a computer screen or as a hard copy document. Refer to page 29 of this document for additional details.
Identification and Accuracy of Returns	<p>Taxpayers not immediately known by first and last name to the preparer must present a photo ID in order to deter identity theft. Exceptions can be made by the Local Coordinator only under extreme circumstances and should not be common practice.</p> <p>Taxpayers must provide documented social security numbers or tax ID numbers for everyone listed on the tax return in order to 1) reduce return rejects and 2) reduce the possibility of identity theft. While the SSN card or ITIN document is</p>

best, volunteers can validate social security numbers by using last year's prepared return, official documents issued by the Social Security Administration such as Social Security cards, income statements, such as SSA-1099s, and other documents issued by Social Security. Documents with truncated social security numbers (typically last four digits only) are acceptable if the number is consistent with the Medicare card or other tax documents, and if the taxpayer presents acceptable government issued photo ID. Volunteer judgment is appropriate and essential in SSN verification.

Counselors may not knowingly prepare returns that are inaccurate or that mis-state tax liability. The use of the Intake and Interview process prior to tax return preparation is required, and will help to develop an accurate picture of income sources and potential credits. The Counselor should probe the taxpayer for further information for any Intake & Interview Form box which is checked "Unsure", and should note on the form any pertinent information provided by the taxpayer. Any change to information provided by the taxpayer should be noted on the I & I form.

Quality Review

Quality review of each tax return by a second certified person, preferably an experienced Counselor, is required. When performed correctly and consistently, quality reviews improve return accuracy, result in fewer e-file rejects, and lead to greater customer satisfaction. For the Gold Standards of Quality Review refer to the OSHC. Sites must use the appropriate Tax Return Preparation software fields to record who performed the quality review. This entry is to be keyed in by the volunteer doing the quality review, and must not be defaulted.

Finishing the Return

When a return has been completed, including quality review, Counselors must review the return with the taxpayer, and explain and ask the taxpayer to sign the Form 8879 confirming that they agree that the return is complete, accurate and ready to e-file to the IRS. Taxpayers must be given one copy of the return and the signed Form 8879. **All taxpayer records, including the Interview and Intake sheet, must be returned to the taxpayer at the end of the tax assistance session. No taxpayer records may be retained.**

Tax Record

Because of important disclosure information, AARP

Envelopes	Foundation Tax-Aide Tax Record envelopes (D12225) must be given to all customers for whom a tax return is prepared.
Program Metrics	<p>Recording and reporting tax assistance activity of various sorts is essential to the AARP Foundation Tax-Aide program. The information collected is used to support funding requests to the IRS and AARP Foundation, as well as for program promotion. Maintaining complete and accurate data for the site creates a record of all taxpayers assisted, and assures that the site and the state receive credit for all assistance given.</p> <p>Recording <i>Question and Answers</i> is very important and often overlooked – please give this special attention. Contact your site supervisor with questions on Program Metrics at your site.</p>
E-filing Process	All e-file sites must have a process to ensure that all returns to be e-filed are submitted in a timely manner (no more than three days from quality review). The site leader(s) must also ensure that acknowledgements are received and confirmed as accepted, and that all problems with rejected tax returns are resolved.
Taxpayer Responsibility	<p>Taxpayers must comply with the program’s “Taxpayer Information and Responsibilities.” A copy of this document must be available at each site for taxpayers to review.</p> <p><i>Taxpayers retain sole responsibility for the accuracy and completeness of their tax returns.</i> Counselors should encourage taxpayers to participate in preparing their own tax forms. Counselors must thoroughly review the return with the taxpayer, explain the purpose of Form 8879 to indicate that they are agreeing that the tax return is complete, accurate, ready to e-file to the IRS and that they understand they are responsible for the return.</p>
IRS Support	IRS offers toll-free assistance to AARP Foundation Tax-Aide Counselors, as part of the TCE program, at 1-800-829-8482.

EXPENSE REIMBURSEMENT

Reimbursable Expenses	Program volunteer expenses are reimbursable for training activity conducted after October 1 and for tax assistance provided during the standard IRS Form 1040 tax filing season through five days after the filing deadline. Counselors, Client Facilitators, Shift Coordinators, and EROs (hereafter referred to as volunteers) can only be reimbursed for transportation, and not for other expenses such as supplies. Volunteers submit reimbursement claims at the end of the tax season after completing 40 hours of volunteer service.
Reimbursement Options	Volunteers may elect a flat-rate stipend of \$35 for the tax season or be reimbursed on the basis of miles driven. Volunteers may also waive reimbursement or take a reduced mileage amount. If they choose to be reimbursed, they may select only ONE of these reimbursement options for the tax season. Either option covers expenses incurred during the training period as well as during the tax assistance season. All expense claims require the approval of the supervisor. Reimbursement requests are made using the Reimbursement tab on the Volunteer Portal. The use of any other reimbursement form is not allowed after December 31, 2016.
Direct Deposit	<p>Direct deposit of volunteer reimbursements is highly encouraged. Direct deposit reduces processing time and costs with reimbursements being deposited in a bank within a few days following supervisor approval. Once established, any and all reimbursements received from AARP Foundation Tax-Aide, as well as any other volunteer service with AARP, will be processed as a direct deposit to the account indicated. The direct deposit request will remain in effect until cancelled by the volunteer, so the process does not have to be repeated each year.</p> <p>The direct deposit option should be established in the volunteer's Portal record, in the Reimbursements Section, prior to the submission of a reimbursement request. Information concerning bank routing information and account number are encrypted and are not visible to anyone. Instructions for adding or updating direct deposit information is available later in this guide and on the OSHC.</p>

Flat-rate Reimbursement Process Volunteers who elect the flat-rate reimbursement option must sign a volunteer Flat Rate Reimbursement Form as instructed by their supervisor at the end of the tax season. No other reimbursement request form is required.

If volunteers do not wish to receive reimbursement, no action is necessary. In that case, thank you for helping to ensure the financial viability of the Tax-Aide program.

Itemizing Expenses- New this year! Volunteers who wish to itemize expenses, i.e., to request reimbursement for mileage, should use the Volunteer Assignment section of their Portal Record and select their highest title that applies to the reimbursement request. *Beginning in Tax Year 2016* a separate reimbursement request is to be submitted for each volunteer activity so that a Counselor who volunteers at two locations, and has two supervisors will submit one reimbursement request to each supervisor at each location. Consult the OSHC, using the Search function, to obtain further information about using the Volunteer Portal to request itemized reimbursement.

Mileage claims must be documented by listing *each date* of travel, the destination(s), and the round trip mileage. The destination and round trip mileage is needed only once for repeated trips to and from the same location, *but the individual dates must be listed along with the hours worked*. The Clone function in the Reimbursement section makes this possible. Total mileage and reimbursement amount are displayed on the data entry screen.

Expense Codes All volunteers should use the expense code “T” for transportation to training sites. Expense code “I” is used for all transportation related to tax assistance.

INSURANCE COVERAGE

Volunteer Travel Accident Insurance

The AARP Foundation provides travel accident insurance coverage for AARP Foundation Tax-Aide volunteers for any injury incurred while conducting AARP Foundation business directly related to the volunteer's position.

- Travel accident insurance coverage to current active Tax-Aide volunteers or accidental death and dismemberment and medical expenses for any injury incurred while conducting AARP Foundation business directly related to the volunteer position. The travel insurance provided for the program is part of the total business insurance coverage for all of AARP and the AARP Foundation. If any AARP Foundation Tax-Aide volunteer sustains an accidental injury while conducting AARP Foundation Tax-Aide business, they should notify the AARP insurance department through their supervisor and State Coordinator. Notification, preferably email, should be sent to:

AARP Insurance and Risk Management Office
Attn: Albert T. Fierro, Director Risk Management
601 E Street, NW, Room A8-100
Washington, DC 20049
Email: afierro@aarp.org
Phone: (202) 434-3245

- The insurance provides an accidental death and dismemberment benefit of \$25,000, and a medical expense benefit of up to \$3,000 for any injury incurred while conducting authorized program business directly related to the volunteer position. The medical expense benefit is coordinated with Medicare Part A and Part B or an assumed equivalent insurance coverage, regardless of the insured's age. This is supplement insurance and should not be viewed as a volunteer's primary insurance.
- **Insurance Coverage Start**
Coverage of volunteer travel accident insurance *does not* require that the volunteer be listed in the program management system at the time of the accident. A volunteer is covered from the time they begin travel to attend their *first* training or meeting with AARP Foundation Tax-Aide. In the case of an incident, if the volunteer is not listed in the program

management system, an email confirmation from the SC is sufficient supporting documentation of participation in the AARP Foundation Tax-Aide program. This written communication, which can be via email, should include the volunteer's name, who they were working with (i.e. who their supervisor would be), and a statement that they were performing AARP Foundation Tax-Aide activities at the time the incident happened.

Volunteer Liability Protection

The Volunteer Protection Act of 1997 (PL 105-19) provides that certified volunteers are not personally liable for harm caused by their act or omission if they are acting within the scope of their responsibilities and training and the harm or omission was not willful. IRS Publication 4491, *VITA/TCE Training Guide* explains the provision in detail.

Thus, it is extremely important that volunteers ***never*** prepare returns that are out of scope of the Tax-Aide program and/or for which they have not been trained. For tax returns that are out of scope or for which a Counselor does not have adequate training and certification, taxpayers should be referred to paid preparers or to the IRS. If volunteers do not feel qualified on a particular issue that is in scope, they should refer the taxpayer to another Counselor who is qualified.

STANDARDS OF PROFESSIONALISM

The Standards

The AARP Foundation Tax-Aide program relies on its credibility for its success. The Standards of Professionalism are the policy statements related to the appropriate treatment of taxpayers and volunteers. Volunteer relationships with taxpayers at sites are one of the largest measures of determining our credibility. At the same time, we recognize that volunteers deserve to be treated with respect and work in a safe environment. *To that end volunteers are encouraged to immediately involve their supervisor at any time they feel their respect has been diminished or their environment is unsafe.*

Together with the IRS Volunteer Standards of Conduct, the Standards of Professionalism outline basic expectations for volunteers. If, at any time, a volunteer violates the Volunteer Standards of Conduct or the Standards of Professionalism, the District Coordinator shall be notified of the circumstances. The DC shall determine whether the individual needs to be removed from the position, counseled, receive further training, or other action should be taken. This decision should be discussed with the SC. The supervisor will complete an Incident Report in accordance with Section 7.9 and forward it to the DC for submission through the leadership chain of command per the instructions. Should the DC be the person found in violation, the State Coordinator will be immediately notified and will perform these duties. The National Office will provide guidance and support to all levels of volunteer leadership to reach a final determination of action to be taken.

A hallmark of professionalism is to limit conversations to topics necessary to accurately complete an income tax return. Discussion of politics, race, nationality, gender, sexual orientation, gender identity, religion, and the impact of income tax policies are inappropriate, since each of them can become an unnecessary source of conflict between volunteers and taxpayers.

Treat all taxpayers and other volunteers equally and with courtesy, regardless of, but not limited to race, nationality, gender, disability, sexual orientation, gender identity or religion.

Follow AARP Foundation Tax-Aide policies at all times. Volunteers will only prepare tax returns that are identified as being "In Scope," regardless of any additional knowledge they may have of income tax

law. There are no exceptions to this policy. If volunteers do not follow this policy they will be subject to dismissal from the program. Volunteers will also be working outside the protection of the Volunteer Protection Act and will be personally liable for their actions.

Quality review following appropriate policies and practices is a required part of the Tax-Aide tax preparation process. There are no exceptions.

Do not discuss or share a taxpayer's information with anyone who does not have the "need to know" in order to complete the return.

When an issue arises regarding the completion of a tax return that requires consulting another volunteer, discuss the issue (without mentioning the taxpayer's name) away from the taxpayer and in a low voice; this ensures not only the protection of the taxpayer's privacy, but also that any difference of volunteer opinion is resolved in a way that sustains the taxpayer's confidence.

If a taxpayer should become angry, do your best to defuse the situation. If that is not successful, move the discussion to a quiet area, if possible, and immediately involve the Local or Shift Coordinator.

Provide appropriate assistance to those with a disability to ensure they feel welcome at your site and ensure that their specific needs are accommodated. If the requested assistance is not readily available report the concern to the Local or Shift Coordinator who will involve the District Coordinator and others as appropriate.

Do not provide the full name, address, phone number, email address or other personal information for any AARP Foundation Tax-Aide volunteer to a taxpayer or agency. Refer such inquiries to your supervisor who will respond or forward to their supervisor for action.

Conflict of Interest

AARP Foundation Tax-Aide volunteers must avoid either a conflict of interest or the appearance of a conflict of interest when conducting AARP Foundation Tax-Aide activities. A conflict of interest, or the appearance of a conflict of interest, occurs when an AARP Foundation

Tax-Aide volunteer engages in providing a service with a profit motive conducted as an employee or an independent contractor, or when a member of the volunteer's immediate family or household participates in such an activity. All volunteers are required to disclose any conflict or potential conflict of interest to their supervisor who will escalate the disclosure through the chain of command to the State Coordinator (or Regional Coordinator if the person with the conflict or potential conflict is the SC), who will determine if the activity described is an unacceptable conflict of interest or not. That determination will be sent simultaneously to the initiating supervisor and others in the chain of command. Failure to disclose may be grounds for removal from the program. Failure to cease the activity is grounds for immediate removal from the program.

Obligation to Avoid Unacceptable Activities

AARP Foundation Tax-Aide Volunteers, while representing the AARP Foundation or participating in an AARP Foundation Tax-Aide activity, shall not promote products, services, or political candidates or issues nor make use of their relationship with AARP, AARP Foundation, or AARP Foundation Tax-Aide for personal profit or the profit of any other individual(s). Volunteers, representing themselves as AARP Foundation Tax-Aide volunteers, are specifically prohibited from engaging in any legislative and/or lobbying activity. Certain AARP activities, such as advocacy and AARP membership drives, may not be suitable for AARP Foundation Tax-Aide volunteers or for co-programming at Tax-Aide sites. Volunteers who violate this policy may be removed from the program.

TAXPAYER INFORMATION AND RESPONSIBILITIES

Welcome to AARP Foundation Tax-Aide site where you will be helped by Tax-Aide volunteers certified by the IRS. Please take a moment to read the following information.

Taxpayers will:

- Provide all required documents to ensure the completion of your return
- **Sign-in at the tax site and follow the guidance of the volunteer**
- **Complete the intake sheet and supplemental intake sheet fully and accurately**
- **Actively participate in the intake interview, tax preparation and quality review process**
- **Inform volunteer of all your income (i.e. cash, gambling winnings, etc.)**
- **Understand that some returns are beyond the program scope (see scope poster) so you might be referred elsewhere**
- Ensure the return is complete and accurate before signing. **Joint returns require the signature of both spouses**
- Agree **that you are responsible for the accuracy of your return**
- Treat volunteers with courtesy and respect
- Call 1-888-687-2277 or email taxaide@aarp.org for comments, questions, concerns or compliments.

Tax-Aide Volunteers will:

- Treat taxpayers in a courteous and professional manner
- Prepare tax returns within the scope of the program
- Provide tax assistance based on the information and documents provided by the taxpayer
- Quality Review all tax returns
- Respect taxpayers' privacy and confidentiality

Tax-Aide Process

Waiting Area

Sign - In
Complete Intake Sheet
Organize Your IDs, SS
Cards and Tax
Documents

Tax Preparation

Check IDs, SS Cards
Review of Intake Sheet
and Tax Documents
Interview Taxpayer
Tax Return Prepared

Quality Review

Check IDs, SS Cards
Review of Intake Sheet
and Tax Documents
Interview Taxpayer
Tax Return Reviewed
Sign Return

Essential Documents to Have at the Tax Site

Picture ID for the taxpayer(s) on the return	Mortgage interest, medical, dental, or charity documentation; business expenses summary; and property taxes
Social Security Cards or ITIN documentation for all on the return	Checks/forms showing federal and state taxes paid
Copy of your last year's tax return	Educational expenses – Form 1098-T and expense receipts
Income Documents – Forms W2, SSA 1099, 1099R, 1099G and other 1099 forms, or self-employment income.	Pension or annuity and date started receiving payments
Brokerage statements - sale of stocks or other capital property	Bank check for direct deposit/debit of refund/balance due
Healthcare – 1095 A, B, or C forms; marketplace exemption letters	

For a complete list on what document some taxpayers might need visit:

www.aarp.org/taxaide

CONFIDENTIALITY AND SECURITY OF TAXPAYER DATA

It is important that this section of the *Policy and Procedures Manual* be reviewed with all volunteers as the confidentiality and security of taxpayer data remains one of our greatest challenges and greatest strengths.

Data Security

Appropriate steps to secure taxpayer data must be taken at all times. All returns must be prepared in the presence of the taxpayer and all tax forms and records, including the Interview and Intake sheet, given back to the taxpayer at the end of that assistance session. **Volunteers will not keep any forms or documents with taxpayer identifying information other than name and contact number.** Taxpayer identifying information will not be shared with the site owner, unless it is mandated by the IRS or a state/local taxation or revenue agency. This includes W-2s, 1099s, and Form 8879. Form 8453 if used for mailing supporting documents to the IRS can be retained, but only for no more than three business days after receipt of the e-file Acknowledgment.

Users shall not retain any taxpayer data on computers or in the cloud during or after the season.

- For IRS-loaned computers use the wipe disk program loaded on them. See the document titled “IRS Laptop Disk Wipe Procedure” located in the OneSupport Help Center (OSHC) > Technology > Security section.
- For non-IRS equipment follow the instructions in the OSHC > Technology > Security section.
- Computers and/or separate storage devices used to create or store attachments for Tax Software Provider e-files must be cleared of taxpayer data following the instructions in the document titled “Tax Return Attachments” located at: OSHC > Technology > Security.

Sites must secure the tax returns stored by the tax preparation software vendor by following the *End of Season Instructions*, and any other instructions published by the National Office. Ensure that a minimum number of individuals have access to deal with taxpayer questions during the off-season.

The operating systems of all computers and tax software accounts must be password-protected and passwords must be changed annually or when requested by the tax preparation software. Passwords must not be shared with anyone who is not an AARP Foundation Tax-Aide volunteer who has also signed a current IRS Form

13615 on file. Writing down passwords and password reminders is discouraged and if used in any form shall be stored away from the computer, carrying case, or anything tax related and in a location that is not visible to others.

Volunteers must follow these guidelines for setting up passwords for Windows and tax software:

- **Minimum length of eight (8) characters**
- **At least one letter and one number; consider including special characters**
- **Choose a password that is not a dictionary word or someone's name**
- **Do not use any word related to taxes as a part of the password.**
- **The IRS password will not be used on non-IRS computers unless it meets the guidelines above.**

AARP Foundation Tax-Aide-approved anti-virus and firewall software must be used to protect all AARP purchased and donated computers from viruses and hackers. Personally owned computers being used to prepare tax returns must run the program-approved anti-virus software or other functionally comparable anti-virus and firewall software. Security software must be updated at least weekly.

Wireless internet communications for computers using tax software is permitted under specific conditions and requirements. No computer being used for AARP Foundation Tax-Aide work whether tax preparation or administrative work is allowed to be connected directly to a public Wi-Fi network while that work is being done. This includes AARP Foundation Tax-Aide provided (and imaged) computers, IRS Depot laptops, or site/personal computers being used for program purposes. All connection to a public Wi-Fi network must be through a router or other security device or application.

Site, donated (without the AARP image), and personal computers may be used in a wireless network after passing a required computer security scan and must be registered. Information on the security scan and registration process can be found in the OSHC > Technology > Security section. As indicated previously, these computers must not connect directly to a public Wi-Fi network while Tax-Aide work is being done. See 8.1.5.

Taxpayer data must not be stored on site-sponsor-owned computers at any time. Use of IRS-provided tax software is allowed on these computers so long as they are protected by strong anti-virus software.

Completely delete all taxpayer information from hard drives before disposal of broken or surplus computers that will no longer be used in the program. This includes making sure that the data is no longer in the Recycle bin. For specific instructions refer to the Equipment Repair, Replacement and Storage Guide available on OSHC > Technology > Equipment.

Do not exchange taxpayer data with anyone by email, fax or by USPS mail or courier. The one exception to this is for Form 8453s and attachments being sent to the IRS. It is preferable to send Form 8453 information as an electronic attachment to the tax return. However, if the forms are mailed, they should always be mailed at a Post Office and never at a home or neighborhood/street-side mailbox.

AARP Foundation computers can be used for personal use before and after the tax season only. The computer must be re-imaged before the tax season with the Tax-Aide image before it can be used for tax preparation.

During the tax season, the AARP Foundation computer must only be used as a tax computer. No personal software can be downloaded or added. Software used to help with tax preparation may be installed.

Physical Security

Because site configuration and volunteer availability are factors in protecting the return from being viewed by unauthorized persons, volunteers are expected to comply with the intent of this section regardless of how they accomplish it.

Computer equipment must be stored in a secure/locked location, whether left at a site or taken home by a volunteer. Also see Section 15.7 for additional information on equipment storage requirements.

Computers must not be left unattended in a visible area of a car.

Volunteers must make every reasonable effort to prevent non-volunteers who are not actively involved in preparing a return from viewing a return while it is open on their computer screen. (It is permissible and even preferred for the taxpayer to view the screen when their return is being prepared or quality reviewed).

Reporting a Loss of Taxpayer Data

In the event that taxpayer data is lost or stolen or is suspected to be lost or stolen, quick reaction is necessary to minimize problems for the taxpayer. This section applies to all situations which involve loss or potential loss of taxpayer data on computers or removable storage media (external drives, flash drives, CDs), or in documents used for tax preparation; tax documents to be mailed to the IRS, etc.

If the loss is the result of theft of a program computer:

- **Notify the National Office (see below), and consider notifying the police** (police report needed for replacement computers), **and**
- **If taxpayer data was potentially compromised call the local police to report the theft and then notify the National Office (see below) as soon as you realize what has happened, and**
- **Send a copy of the police report to the National Office**

If the loss is the result of theft of an IRS Computer:

- **Additionally notify the IRS Relationship Manager (or ask your supervisor to notify the IRS Relationship Manager).**

If the loss is the result of loss/theft of paperwork or documentation, such as paperwork used to prepare a return, or paperwork to be mailed to the IRS attached to an IRS Form 8453, then:

- **Notify the Police, and**
- **Notify the National Office, and**
- **Notify Taxpayer if not already aware**

Inform your volunteer supervisor about the situation and ensure your TC/TCS is notified for inventory management purposes.

Call AARP at 1-202-434-2038 or 'Submit a Request' in OSHC, immediately (within 24 hours) if ANY computer/form/etc. containing taxpayer data is lost or stolen.

The National Office does not expect volunteers to replace AARP or IRS computers that are stolen but if a claim is submitted to the volunteer's insurance company and the volunteer is reimbursed for the value of the computer(s), that portion of the settlement should be sent to the National Office to pay for a replacement(s).

VOLUNTEER ASSESSMENT

Volunteer Assessment of AARP Foundation Tax-Aide

You are invited to participate in the assessment of the season and help shape the improvements for next season. Your personal experience is invaluable -- please share it.

The two-part assessment form follows. Please fill out each part and give this form to your supervisor .. Your supervisor will consider your views when submitting his/her own assessment.

From:

(your name)

(your title & state)

To:

(supervisor name)

(supervisor title)

Date:

Please get this evaluation to your supervisor to provide feedback.

Part 1 Circle appropriate rating numbers

All volunteers should rate statements 1 - 14 below.

5=completely agree 4=somewhat agree 3=neutral 2=somewhat disagree 1=completely disagree.

	Disagree				Agree
1 Program goals are clearly stated.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
2 The program is well publicized.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
3 Volunteers are well trained.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
4 Testing & certification are consistent & fair.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
5 IRS provides adequate support.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
6 Information is communicated as & when needed.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
7 Materials, forms & supplies are sufficient.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
8 Necessary equipment is available.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
9 Counseling sites are well managed.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
10 Counseling sites have enough Counselors.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
11 All tax returns are quality reviewed.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
12 Reports are submitted accurately & timely.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
13 Sites are monitored & helped as needed.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
14 Supervisors recognize volunteers' service.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

***Counselors should proceed now to Part II on the reverse side of this page;
all others should rate statements 15 - 21 below before proceeding to Part II.***

	Disagree				Agree
15 Statistical reports (activities & costs) are received timely.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
16 Program national committees give needed support.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
17 Program Metrics is easy to understand and complete.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
18 The program's organizational charts are helpful.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
19 Our organizational structure makes sense.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
20 Recruiting resources provide adequate assistance.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
21 The program reaches as many communities as need it.	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

Part II (to be completed by all volunteers)

1. **What worked well?** *(describe innovations, successes, goals that were attained)*

2. **What did not work well?** *(describe problems that you need help in solving, goals that were not attained)*

3. **What new group of taxpayers did you serve?**

4. **What support do you need?** *(e.g., training in _____, communication, publicity, supplies, equipment, etc.)*

5. **Specific ideas for program improvement:** *(e.g., how to reach more customers, bring in more volunteers, improve training)*

6. **Other:** *(let off steam or brag about someone or something)*






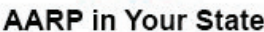



7. **Specific actions I will take to improve AARP Foundation Tax-Aide service in my territory or area of responsibility:**


8. **Counselors only: If a leadership position -- coordinator, instructor, or both-- were available, would you be interested in serving?**
Yes ☐ ☐ Coordinator No ☐
☐ Instructor

Thank you for your contribution!

VOLUNTEER PORTAL

Visit the Volunteer Portal at <https://volunteers.aarp.org> for access to the OneSupport Help Center, your contact record, and reimbursement.





The AARP Volunteer Portal is an easy to use website that provides tools, information and resources for AARP and AARP Foundation Volunteers.

Login to Portal

Email Address

Password

[Forgot password?](#)

LOGIN

Having trouble with this form?
Call 1-866-839-0463, 7:00am - 11:00pm ET Monday - Friday.

Use the “Forgot password” link if you have trouble logging in.

VOLUNTEER PORTAL- DIRECT DEPOSIT

Overview

Volunteers can request to have their reimbursement(s) deposited directly into the bank account of their choice. Only volunteers can edit and save changes to their direct deposit information; volunteer leaders cannot complete this task for another volunteer.

Topics:

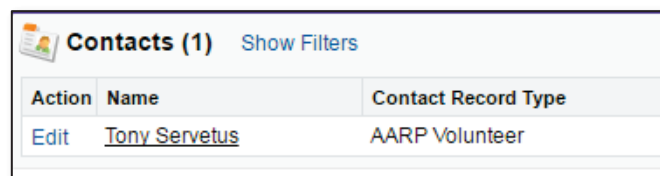
- How to Update Your Direct Deposit Information
- What to Expect after Updating Your Direct Deposit Information

How to Update Your Direct Deposit Information

1. From the Portal homepage, enter your name into the search bar.
2. Click **Search**.
3. Click on your name in the **Contacts** section.
4. Click **Edit** on your **Contact Record**.
5. Scroll down to the **Expense Reimbursement Information** section, and enter your direct deposit information.

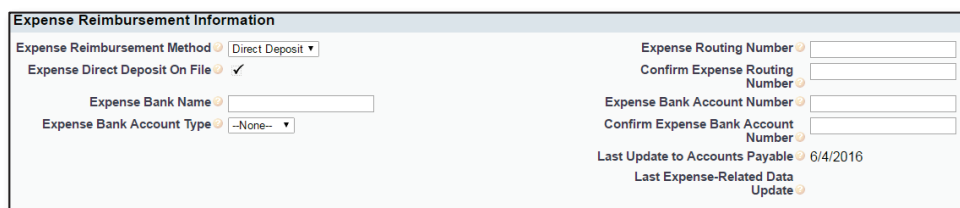


Search... Search



Contacts (1) Show Filters		
Action	Name	Contact Record Type
Edit	Tony Servetus	AARP Volunteer

- a. Select **Direct Deposit** as the **Expense Reimbursement Method**.



Expense Reimbursement Information

Expense Reimbursement Method Direct Deposit

Expense Direct Deposit On File ☒

Expense Bank Name

Expense Bank Account Type

Expense Routing Number

Confirm Expense Routing Number

Expense Bank Account Number

Confirm Expense Bank Account Number

Last Update to Accounts Payable 6/4/2016

Last Expense-Related Data Update

- b. Enter your **Expense Bank Name** and **Expense Bank Account Type**.
- c. Enter the **Expense Routing Number** and **Expense Bank Account Number** for your bank.
- d. Re-enter the **Expense Routing Number** and **Expense Bank Account Number** in the **Confirm Expense Routing Number** and **Confirm Expense Bank Account Number** fields.

6. Click **Save**.

What to Expect after Updating Your Direct Deposit Information

- Until your banking information is verified, the last four digits of your account number will appear in the Portal.

Note: Your banking information will be encrypted upon saving and will not be visible to other users of the Volunteer Portal.

- Once your direct deposit information has been verified, **Direct Deposit** will appear in the **Expense**



Expense Reimbursement Information

Expense Reimbursement Method Direct Deposit

Expense Direct Deposit On File ☒

Expense Bank Name

Expense Bank Account Type

Expense Routing Number

Confirm Expense Routing Number

Expense Bank Account Number

Confirm Expense Bank Account Number

Last Update to Accounts Payable 6/4/2016

Last Expense-Related Data Update

Reimbursement Method field and a check mark will appear next to the **Expense Direct Deposit On File**. Additionally, the **Last Update to Accounts Payable** date will appear in the **Expense Reimbursement Information** section.

- Within 48 hours of saving your information, all banking information-including the last 4 digits of the account number-will be expunged from the Volunteer Portal.

Note: **Submit a Request** through the OneSupport Help Center if your banking information ever appears for longer than 48 hours.

VOLUNTEER PORTAL- ACCESSING ONESUPPORT HELP CENTER (OSHC)

Accessing OneSupport

Overview

All information pertaining to the AARP Foundation Tax-Aide Program including training materials, communications, and Policy and Procedures are housed within the **OneSupport Help Center**.

Topics:

- How to Access the OneSupport Help Center

How to Access the OneSupport Help Center

1. From the Portal Homepage, click on the **OneSupport Help Center** link in the left hand sidebar.
 - a. If the left sidebar does not appear under the **Home** tab, click on the small arrow to the left and slightly below the **Home** tab or hold the **Alt** key and the **"S"** key at the same time.
2. A new window will appear. Using the **Search** feature, type keywords to produce the information you are seeking.
3. Click on the item you wish to view.

