

Policy CO1-02: In-Home Tax Preparation

Background. The *Policy and Procedures Manual* provides guidance for in-home tax preparation for shut-ins (p. 35, para. 7.5). While the practice is allowed when conducted within the guidelines of the *Policy and Procedures Manual*, it is also officially discouraged (p.35).

Policy. Tax-Aide volunteers in CO1 will not prepare taxes in-home, with exceptions as listed below:

1. In-home visits to prepare taxes for friends and family.
2. Preparation of the volunteer's own taxes.

Implementation. If tax returns are prepared in-home according to the exceptions listed above, all conditions and guidelines specified in the *Policy and Procedures Manual* apply, with the exception that reimbursement for travel expenses is not allowed.

References.

AARP Foundation. *The Policy and Procedures Manual of Tax-Aide, 2017-2018.*