

Policy CO1-06: Contact Information on the Tax Return

Background. Information about the program and the preparing site should appear in the Preparer section of the Form 1040. This information usually includes the name of the program (“AARP Foundation Tax-Aide”), the site name, and a telephone number.

If a taxpayer receives a letter from the IRS or DOR during the off-season, they may try to contact someone in the Tax-Aide program to help prepare a response to the letter. The telephone number on page two of the Form 1040 may be the first place they turn for help.

If the telephone number is that of the site facility, they often are unable to help, leading to frustration on the part of the taxpayer. If the number is that of a volunteer in the Tax-Aide program, there may be inconvenience for both the volunteer and the taxpayer if the volunteer is no longer with the program, away on vacation, or unable to access the tax preparation software. Even if these situations do not arise, the volunteer may be inconvenienced if the number of calls is large.

AARP mans a 24-hour Call Center that will collect pertinent information, log the contact, and route a request for action to the appropriate agency. If the contact concerns Tax-Aide, the contact will route through the State Coordinator to the District Coordinator for action to the site that prepared the return.

Policy. The telephone number that appears in the Preparer section on page two of the Form 1040 should be the phone number for the AARP National Call Center. Personal phone numbers or site phone numbers should not be used. The sole exception to this policy is if a district has a dedicated phone number and dedicated person to field calls during the off-season.

Implementation. The administrator of the tax preparation software should enter the telephone number of the National Call Center during the setup procedure for the software so that the Call Center number appears on the taxpayer’s return.

References.

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

AARP Foundation. *The Volunteer Portal Guide, 2017-2018.*