

Portal Activity Reporting System

Frequently Asked Questions

- 1. The ERO at our site uses the daily Activity Reporting Log to reconcile returns prepared and help track returns to be transmitted. Can we modify the log to meet our purposes?**

Yes. The Activity Reporting Log is posted on the Volunteer ShareNet in Portal and the Extranet in Excel format.

- 2. How do I know if my site is an E-file designated or Paper-designated site?**

Local Coordinators and District Coordinators can view the site's designation in Update Site Information in Portal. The designation is under the E-file tab. If the Site Management System indicates "Yes" next to "E-file?", the site is e-file designated; if the "No" indicator is used, the site is considered a Paper-designated site.

- 3. In 2011 I used the Traditional Activity Reporting System. Why can't I find and access the system?**

In 2012, all Tax-Aide sites will use the Portal Activity Reporting System. Sites only report paper-filed returns. See the Activity Reporting Presentation on the Volunteer ShareNet in Portal and the Extranet for how to use the system.

- 4. We have clients that prepare and file their own Federal return. They come to our site so that we can prepare their State return. We use TaxWise to prepare both their Federal and State return; however, we do not file their Federal Return. How should this service be recorded on the Activity Reporting Log?**

It is often more expedient and accurate to prepare a Federal return, that will never be filed, in order to provide TaxWise with the information it needs to generate the State return. In these situations, the service should be recorded in the State/Local Only Return column.

- 5. I'm a Local Coordinator and I don't use the computer to access the internet. How do I submit my site's monthly activity totals?**

In situations where a LC does not use a computer to access the internet, the District Management Team should determine a process and procedure for sending the site's monthly activity data to the District Coordinator who can enter the data for the LC. However it is expected that all LCs have a valid and unique Email address and access to the Volunteer Portal.

- 6. I do not see E-filed return data in the Activity Reporting Screen. Why?**

E-file counts are provided by the IRS and are only available in site activity reports generated by the National Office. Local Coordinators should contact their District Coordinator and District Coordinators should contact their ADS to request reports.

- 7. My site is an E-File Designated Site. I am tracking Quality Review in TaxWise for all TaxWise prepared returns, but I am not tracking Quality Review for paper prepared returns. Am I doing something wrong?**

No. For E-File Designated Sites, Quality Review will only be tracked and calculated from data that is reported by the IRS to the National Office from TaxWise.

8. How is the National Office going to calculate Quality Review Percentage for E-File Designated Sites?

The total number of Quality Reviews recorded in Preparer Use Field #14 on the Preparer Use Form in TaxWise for e-filed Federal Returns divided by the total number of e-filed Federal Returns will give the percentage of the quality reviewed returns. It will be assumed that the Quality Review practices for any paper filed returns (at E-File designated sites) mirrors that of e-filed returns.

9. The counting instructions for the Site Activity Log do not ensure that all services are counted. Why?

The number of people helped and the number of Federal Returns prepared are the two key counts required by program sponsors. It is difficult to develop counting practices that allow for the counting of all services without overstating the number of people helped, and as such, we must err on the side of under-reporting vs. over-reporting. The program acknowledges that through its counting procedures, total numbers may be slightly understated at the National level.

10. When I open Activity Reporting in the Portal, I don't see some of the sites I am responsible for. What should I do?

There could be several reasons why you are not seeing a site that you are responsible for in Activity Reporting. It is possible that the site record has not been updated with the correct DC/LC assignment. Also, the National Office takes a snapshot of all active sites at beginning of each February, March, April and May and it may be possible that the site record assignments were updated after the snapshot was taken. The following steps should be taken to resolve and explain the issue.

- Verify that the site is an active site with you assigned as DC/LC. This can be accomplished by accessing the Site Management System.
- If the site is displayed, this means the assignment is correct but the assignment was made **after** the snapshot was taken. You will not be able to enter, edit or submit/approve data for the site until next month. The ADS can make the edit for you.
- If the site is not shown in your list through the Site Management System, then you should contact your state's ADS and ask them to update the DC/LC assignment in the site record. Again, because the site was not assigned to you at the beginning of the period, prior to the snapshot, only the ADS can enter data for the site for this period.

11. When I click on Site Activity [in the Volunteer Portal] I get a message that reads "There is currently no open Reporting period." What should I do?

See Answer to Question #10.

Support and Reference/Training Materials

For Activity Reporting Support:

- Local Coordinators please contact your District Coordinator
- District Coordinators please contact your Administration Specialist

For Support related to registering for or accessing/logging into the Volunteer Portal:

- For technical support,
 - send e-mail to: Tax-Aide-Ops@aarp.org

Activity Reporting Reference/Training Materials – Located on ShareNet or Extranet:

- Activity Reporting Training Presentation (PDF and Narrated Brainshark)
- Activity Reporting Log (Excel and PDF versions)
- Site Activity Collection Template (Excel)
- Activity Reporting Log Examples (PDF)
- Frequently Asked Questions (PDF)

Volunteer Portal Access and Overview

- <https://volunteers.aarp.org> for Volunteer Portal registration, login and access to web-based Activity Reporting System