

AARP Tax-Aide

Site Sign-In Sheet (Activity Reporting Record)

Site ID # _____

Date(s) _____

| | Taxpayer's Name (also include those helped with questions and answers only) PLEASE PRINT CLEARLY | Type of Serviced (paper &/or efile) | | | | | 6) All Quality Review 2 nd counselor's Initials | 7) Counselor Initials | 8) Counselor's/ Reviewer's Comments (if needed) |
|----------------|---|--|-----------------------------------|--------------------------------|--------------------------------------|-------------------------------------|---|-----------------------|--|
| | | 1) Federal Return (Current Year) | 2) Federal Return (Prior Year) | 3) Federal Return (Amended) | 4) State/Local <u>Only</u> Return | 5) Question & Answer <u>Only</u> | | | |
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| TOTALS: | | | | | | | | | |

Counselor Instructions on Back of Form

AARP Tax-Aide is a program of the AARP Foundation, offered in conjunction with the IRS.

Site Sign-In Sheet Instructions

The Site Sign-In Sheet should be used to record the services provided to tax-payers. This information, in association with information from other sources will provide a complete picture of all services to tax-payers.

How to Fill Out the Form

1. Clearly list the site SIDN and the date(s) covered by the activity.
2. Fill in one line for each interview or assistance effort.
3. Enter the client's name each time an interview or assistance was provided to a taxpayer.
4. Before calling the next client, counselors should record any and all tax assistance they provided to the previous client as follows:
 - i. The Type of Service provided each taxpayer (household). Check (✓) all applicable boxes (1-5) to indicate type of service(s) provided.
5. The counselor providing assistance and the quality reviewer should initial column 6 & 7 respectively.
6. If there is any additional information needed, such as the taxpayer needs to return with additional forms, or any other local notes, these can be listed in column 8.

Definition of the 6 Pieces of Information

The intent of collecting statistics is to get an overall count of the total number of taxpayers served by the program. As a result, the following pieces of information are being asked for:

Federal Return (Current Year): This includes any federal returns that were completed, and are ready to be submitted either by paper or e-file, for the current tax year.

Federal Return (Prior Year): This includes any federal returns that were completed for years other than the current tax year.

Federal Return (Amended): This includes any federal returns that were amended for any tax year.

State/Local Only Return: This includes any state/local return that was completed where a federal return was not also completed. This should be a single count even if both state and local returns were completed and includes returns submitted either by paper or e-file.

Question & Answer Only: This includes any services where a taxpayer asked questions about their taxes or tax filing where neither a federal nor state return was completed. If a state and/or federal return was completed, and additional questions were asked and answered, it would not be considered "Q&A Only".

All Quality Review 2nd Counselor's Initials: A second counselor on-site quality review on any return is *required*. This QR is counted as a single QR regardless of how many returns the counselor has completed for the taxpayer.

How to Submit Total Activity for Reporting Purposes

1. Completed Sign-in Sheets are collected and submitted as instructed by the supervising coordinator.
2. The Local Coordinator or his/her designee will review the sheets for accuracy and total all columns – counting "1" for each ✓, summing columns 1-5, and counting the number of initials in column 6.
3. The Totals information is compiled and reported via the AARP Web extranet link www.aarp.org/tavolunteers/ as directed and specified by the State Management Team *for the entire tax season*. The reporting period submission dates into this website are posted on the AARP Web extranet at www.aarp.org/tavolunteers/.
4. Any omissions in a reporting period (i.e. if information was missing for a site/district), should be reported in the following reporting period and should be communicated up the chain of command in your area).

Review and Adjustment

1. The ADS for your state will review the submissions and make any necessary adjustments and/or corrections within 10 days of the following the website submission.
2. A fourth reporting period, covering services provided from April 27th – August 31st, should be coordinated between the SC and ADS for the split state and submitted to the National Office in early September.

For more information, contact your supervisor or visit the AARP Web extranet site at www.aarp.org/tavolunteers/