

ELECTRONIC RETURN ORIGINATOR (ERO) Position Description

Program: The AARP Tax-Aide program provides free personal income tax assistance and tax form preparation to low- and moderate-income taxpayers, with special attention to those age 60 and older.

Purpose of Position: The Electronic Return Originator (ERO) works with the Local(Site) Coordinator (LC), 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 (*TaxWise*TM) and the software provider (CCH)'s Electronic Filing Center.

Responsibilities of Position: Guided by the policies and procedures of the AARP Foundation Tax-Aide Program, an ERO:

- Transmits prepared e-files to the CCH Electronic Filing Center (Includes State e-files);
- Receives IRS/State e-file Acceptance or Rejection;
- Assures rejected e-file returns are resolved;
- Maintains required IRS and State e-file records until the end of the tax season;
- Sends IRS copy of accepted 8453s to appropriate IRS Service Center;
- At the end of the tax season, sends to the TC, TCS, or IRS Territory Manager (TM) (a) encrypted backup media containing all accepted returns, (b) copies of all required Forms 8879 and 8453 and attachments, (c) all Acknowledgement Reports, and (d) deletes all taxpayer data from computer(s); Note: For TWO users only (b) applies, since SPEC has access to all TWO reports.
- Provides reports as requested by the TC or TCS.
- Provides ongoing support to electronic filing Counselors by answering questions and addressing anomalies that occur during electronic filing procedures. Communicates problems to TC for resolution.
- Complies with the Confidentiality and Security of Taxpayer data document that is included in the Counselor Digest, the Technology Management Guide, the Policy Manual, and is posted on the Extranet.

Qualifications: The ERO must have a working knowledge of personal computers, software, and electronic communication systems and must pass the required sections of the annual IRS certification exam to become proficient with the IRS-supplied tax preparation software and be certified as a Counselor.

Term of Service: The 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.

Eligibility: The ERO is eligible for other AARP or AARP Foundation volunteer positions.

Time Required: The position is most active during February through April.

Training Required: The ERO must acquire knowledge of tax law (for reject resolution), electronic filing procedures, including software and hardware issues, as well as an orientation to AARP Tax-Aide program.

Travel Required: The 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: The LC appoints the EROs with the concurrence of the DC. The ERO reports directly to the LC.

Scope of Authority: The ERO assists the LC in all matters concerning the electronic filing of federal and state tax returns at assigned site(s).

Working Relationships: The ERO maintains a close working relationship with the LC, e-filing Counselors, District TCs, and CCH for the electronic filing of federal and state tax returns.

Progress Review: The ERO's performance is monitored by the LC with feedback from the district's TC.

Available Resources: AARP Tax-Aide reimburses ERO for reasonable covered program expenses (usually just mileage) as set out in AARP Tax-Aide policy. The ERO cannot be reimbursed for "S" expense items.

Volunteer Policy: AARP Foundation volunteers will receive equal opportunity and treatment throughout recruitment, appointment, training, and service. There will be no discrimination based on age, disabilities, gender, race, national or ethnic origin, religion, economic status, or sexual orientation.

ERO Tasks

The ERO is usually the contact person for the site's EFIN and is a key person for e-file sites. The ERO is typically the senior e-filing volunteer at a site and has additional tasks as indicated below. EROs must be certified tax Counselors. AARP Tax-Aide considers the ERO to be the transmitter of e-files.

At the end of each day, or at least twice a week, the ERO should transmit all completed e-files to the CCH Electronic Filing Center using either a modem and the CCH toll-free telephone number, or the Internet. The CCH Electronic Filing Center will forward returns to the IRS and receive acknowledgements from IRS. These acknowledgements are then returned back to the ERO during the next transmission. IRS acknowledgements

are typically available for downloading the following day. State acknowledgements are typically available a few days after the IRS accepts the e-file.

The ERO transmission of e-files to the CCH Electronic Filing Center may be made from the AARP Tax-Aide site or from the ERO's home. ***For the TaxWise Desktop version, it is essential to use the same computer for all transmissions for a given EFIN.***