

# AARP Tax-Aide

## Activity Reporting

### Local and District Coordinators Reference Sheets

As previously announced, the AARP Tax-Aide program is implementing a new way to count and report on the level of site activity. This new and exciting process is easy to do, takes less time, has clearer definitions of what is needed and when it is needed. Additionally, duplication of effort is minimized because information from *TaxWise* will be combined with information from volunteers via the new site sign-in sheet and internet submission process!

This packet is intended to act as a quick reference and provides a short list of the steps (and internet screen illustrations) that the:

1. Local Coordinator (LC) needs to do to successfully submit their counts
2. District Coordinator (DC) needs to do to successfully review and approve their counts

This system was designed with you, the volunteer, in mind. We have attempted to make the screens easy to use. Although we do plan to make future enhancements to how the screens work – all in an effort to make it easier for volunteers to use – we believe that this is a good first year effort towards automation of this activity reporting collection process.

If, as you use the new system, you have questions about how it works, please contact your supervisor or state management for guidance and assistance. Additionally, please feel free to review the materials posted on the AARP Tax-Aide Volunteer Extranet website ([www.aarp.org/tavolunteers](http://www.aarp.org/tavolunteers)) for more background and information on this exciting new, streamlined, process! If any updates are needed throughout the tax filing season, they will be communicated through *Cybertax*. (If you don't currently receive *Cybertax*, please sign up by e-mailing [taxaide@aarp.org](mailto:taxaide@aarp.org) with your email address, name, state and volunteer title.)

Thank you for your continued efforts and good luck in this upcoming tax season!

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AARP Foundation

Website for the public: [www.aarp.org/taxaide](http://www.aarp.org/taxaide)  
Website for volunteers (Extranet): [www.aarp.org/tavolunteers](http://www.aarp.org/tavolunteers)

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## Activity Reporting on the Internet Reference Page for Local Coordinators (LC)

1. Collect all Site Sign in Sheets. Count check marks (and Second Counselor initials) for each of the 6 columns on each sheet. Tally all the sheets for the reporting period.
2. From a computer, log onto the internet. Go to the AARP Tax-Aide Volunteer Extranet website ([www.aarp.org/tavolunteers](http://www.aarp.org/tavolunteers)). Select the link for "Activity Reporting". The following screen will appear:

Type in the LC ID number and click the button indicated in the screen to the left

3. A screen will appear with the site(s) assigned to this LC within the National Database. This screen contains boxes for the 6 columns of information tallied in step #1 above. Hit "TAB" on the keyboard to get to each one of the 6 boxes, and enter in the numbers you have tallied.
4. *If this is the one and only time for the reporting period* you will be submitting counts for this site(s):

SIDN #	Total Federal E-filed (Current Year)	Total Federal Joint Returns e-filed (Current Year)	State Returns E-filed (Current Year)	(Paper and/or efile)				Q & A Only	Quality Reviews
				Federal Returns (Current Year)	Federal Returns (Prior Year)	Federal Returns (Amended)	State/Local Only Return		
S2305051B	10	10	5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
S2305051V	10	10	5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
S2305051B	10	10	5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Recalculate</b>	<b>30</b>	<b>30</b>	<b>15</b>						

Click the "Submit & Exit" button as shown in the screen to the left

Congratulations, you have just **FINISHED** reporting for the month!

5. *If you plan to go in again during the reporting period* to add another week's information

Click the "Save & Exit" button as shown in the screen to the left

This will ensure that your counts will show up the next time you log on

6. When you need to submit more counts for the following week, repeat steps 1-2 above. The input screen will reappear, and it will show the entries you entered and saved earlier.
  - a. TAB to the boxes you wish to update. (**Note: this screen will not add information together. You will need to add this yourself and replace the numbers on the screen.**)
  - b. If this is the last time you will be submitting counts for this site for this month's reporting period, hit the "Submit & Exit" button. Otherwise, hit the "Save & Exit" button if you need to finish later.

## Activity Reporting on the Internet Reference Page for District Coordinators (DC)

- From a computer, log onto the internet. Go to the AARP Tax-Aide Volunteer Extranet website ([www.aarp.org/tavolunteers](http://www.aarp.org/tavolunteers)). Select the link for "Activity Reporting". The following screen will appear:

Type in the DC volunteer ID number and click the button indicated in the screen to the left

- If this is the first time logging in, you may be asked if you wish to report by site or district level. Note: the Administration Specialist for your state may have already selected the reporting option for you. If they have, you will not be asked this question.
- A screen will appear with all the site(s) assigned to this DC, sorted by Local Coordinator (LC) within the National Database. This screen contains boxes for the 6 columns of information tallied by the LC in step #1 on the previous page.
  - The DC can enter information for any site shown and can change what a LC has listed if the site reporting option was selected. If the district reporting option was selected, changes (assuming you wish to make them) would be entered at the bottom of the list of sites.

If entering or changing information throughout the month, click "Save & Exit" when finished

This will ensure that your changes will show up the next time you log on

- After the end of the reporting period, there is a 5 day period for the DC to finalize and approve reporting. Once this period starts, a new button will appear that will enable the DC to approve the final numbers for the reporting period.

If entering or changing information during the 5 day period, click "Save & Exit" if you want to finish later

OR

Click "Approve & Exit" if it all looks complete

Congratulations, you have just **FINISHED** reporting for the month!

## Two unrelated but very important messages:

1. As you may know, based on late action by Congress on the Alternative Minimum Tax (AMT), the IRS has had to make necessary systems changes. The IRS has minimized the impact to a relatively few taxpayers as it was impossible to make all the changes in time for the IRS' regular season start. Please note below that there are five forms that cannot be filed, e-filing or paper, until approximately February 11<sup>th</sup>. Some of these forms will affect the taxpayers we assist. We will keep you informed via *Cybertax*, the program's e-newsletter, as we hear more on this topic. If you don't currently receive *Cybertax*, please sign up by e-mailing [taxaide@aarp.org](mailto:taxaide@aarp.org) with your email address, name, state and volunteer title.

The February delay caused by the AMT patch will affect taxpayers using these five forms:

- Form 8863, Education Credits.
  - Form 5695, Residential Energy Credits.
  - Form 1040A's Schedule 2, Child and Dependent Care Expenses for Form 1040A Filers.
  - Form 8396, Mortgage Interest Credit.
  - Form 8859, District of Columbia First-Time Homebuyer Credit.
2. Please remember to encrypt, for security of taxpayer data all computers, holding taxpayer information. The *TrueCrypt* encryption software and needed information is located on the volunteer extranet at [www.aarp.org/tavolunteers](http://www.aarp.org/tavolunteers). If, after review of the information, you have any questions about the process email [Taxaidetech@aarp.org](mailto:Taxaidetech@aarp.org).

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