

AARP Tax-Aide – General Guidance for Emergency Response

Safe site operations and the wellbeing of AARP Tax-Aide volunteers and taxpayers are of upmost importance. As a program that serves the public at thousands of locations, we need to be prepared to deal with emergencies which may include natural disasters or other local situations, accident or sudden illness of a volunteer or client, or an angry or hostile individual.

General Guidance:

1. Local Coordinators will prepare and have on site a contact list of all volunteers who might be expected to work at their site, a responsible individual for the site facility and a back-up, and the Local and District Coordinators with both land line and cell phone numbers if possible.
2. A good practice for several reasons is to put only first names or first names and last name initial on name tags.
3. Know nearest exits and evacuation route out of the building and from the area used at the site.
4. Have an established rally point for evacuees and take a head count as soon as possible after any evacuation.
5. Know the location of fire extinguishers and other emergency equipment that might be available for an emergency.
6. Know if any volunteer has special evacuation or medical needs. Assign another volunteer to assist that volunteer if assistance is ever needed.
7. Important to any plan, it must be compatible with and coordinated with the site's host.

Accident or sudden illness of a volunteer or client

1. Remain calm, assess the situation and get help as appropriate.
2. Call, or have someone else call 911 stating the nature of the emergency and the address of the site.
3. State the name of the caller and phone number from which they are calling.
4. Ask someone to meet emergency personnel and escort them to the scene.
5. It is often best not move the injured or ill person unless they are in immediate danger of further injury.
6. Keep the victim warm and comfortable.
7. While waiting, check victim for consciousness, chest pain, breathing, pulse, bleeding, severe head injuries or burns, etc.
8. If the victim is conscious, reassure them that help is on the way.
9. If someone has first aid or CPR training, consider giving first aid to the injured person(s).

If any AARP Tax-Aide volunteer sustains an accidental injury while conducting AARP Tax-Aide business, they should notify the AARP insurance department through their supervisor and AARP Tax-Aide State Coordinator. Notification, preferably email should be sent to:

AARP Insurance and Risk Management Office
Attn: Albert T. Fierro, Director Risk Management
601 E Street, NW, Room A8-100
Washington, DC 20049

Email: afierro@arp.org Phone: (202) 434-3245

An Angry Taxpayer – (This can be applied generally to a person who is not a taxpayer but still confrontational at a site.)

- **Communicate in Calm Voice** – Demeanor is very important. A calm, professional manner; body language that conveys a friendly concern; a neutral tone of voice, low pitch, and moderate speed when speaking can help calm the other person. Do not rush. This manner may diffuse a potentially volatile situation and prevent matters from spinning out of control.
- **Do not be Confrontational with the Person** - Use tact when speaking. Remember to stick to the facts and do not lose your calm or get angry no matter what the taxpayer may say. If you were the source of the person's hostility even though not at fault in any way, it's best if you can remove yourself. Often just having another person say near exactly the same thing is all it takes to diffuse the situation and get the person to understand the issue at hand.
- **Use Empathy and Paraphrase** - The most common technique for conveying empathy is paraphrasing. When you summarize by restating a taxpayer's complaint in your own words, you demonstrate that you have listened and understand the problem, even if there is nothing you can do about it. You do not have to agree with the taxpayer on the issue. Paraphrasing helps you defuse a potentially volatile situation by making the other person stop talking. To listen, the taxpayer must stop talking. The taxpayer usually will because he or she wants to make sure you understand his or her concern. You can start to paraphrase by saying; "So what you are saying is. . .," or "Let me see if I understand the situation. . ."
- **Find the Problem and, if you can, suggest a solution** - Resolution of any problem is only possible when you have an understanding of the true problem and its underlying cause. Once they have told you what the problem is, repeat that back to them in your own words so that you are sure you know what has caused the situation.

In some cases, providing alternatives to the taxpayer is appropriate. For example: "I know you have been waiting a long time. You can continue to wait for the volunteer you requested or we can help you next with someone else." In other cases, apologizing and making a commitment to correct the situation is sufficient. "I'm sorry that we missed your turn and I will work with the Client Facilitator to help make sure this doesn't happen again. I appreciate your bringing the problem to my attention."

If these solutions do not placate the person, the volunteer should take a progressively firmer tone. The volunteer could ask the taxpayer to step out of the room if the taxpayer is starting to be disruptive. (This other area should also be public with at least one other person present to get help if needed.) The volunteer should ask for cooperation from the taxpayer. Many people respond favorably to this if the volunteer is polite and cooperative: "Please sir/ma'am, I would like to work with you to solve the problem and prepare an amended return, may I have your help?"

At this point the taxpayer may be cooperating, but not fully. The volunteer should make sure that the individual understands the options and the volunteer's desire to be helpful. If, however, a potential

solution is not possible because of a policy such as scope, then respectfully direct the taxpayer's attention to the particular reference on the scope poster, if it is available, or explain volunteers are not trained to handle the taxpayer's return and program policy requires volunteers only to prepare returns within our training only. It may be necessary in another type of situation to convey to the taxpayer, "Sir, we are not able to reconcile your desired tax position with our tax training. We believe you would be better served by another preparer, including some of the paid preparers in the community, who might be more comfortable in this particular tax area and preparing the return in the manner you are requesting. We are only allowed to prepare returns in which we are confident that the return will be correct. We are not positive in your situation and believe you will be better served by a preparer who is confident which could save you problems with the IRS later."

- **Always Remember That Safety Comes First!** – You may not be able to diffuse every volatile situation. Help might be needed with an angry taxpayer and any threats or other overt signs of violence should be taken seriously. If a volunteer is unable to calm the disruptive person and that person becomes very angry, threatening, or violent, call 911 immediately. In any situation where 911 is called, you must call the AARP Tax-Aide national office at (202) 434-6027 as soon as possible, leaving a message if necessary. You must also notify your volunteer leader. Your leader may request this notification using the Incident Report Form (available on the Extranet).