

**AARP Foundation Tax-Aide**

**Activity Reporting, Quality Review & ERO Tracking Log**

Date(s) \_\_\_\_\_

Site ID# \_\_\_\_\_

	Taxpayer Name (also list those helped with questions and answers only)  Last Name, First Name(s)	Activity Reporting					6) Counselor's Initials	7) Quality Reviewer's Initials	E-file Tracking				
		Type of Service							8) Federal / State to be e-filed	9) 8879 signed by all Taxpayers	ERO ONLY		10) Comment Examples: NNTF - No Need to File OOS - Reason (why return is Out of Scope) Amended Tax Year Prior Tax Year (use a separate line for each year) Federal Only (no State Return) Reason for Paper Return 8453 - Reason form is attached for mailing 8879 HOLD - (and/or state equivalent) Signature(s) Needed Taxpayer HOLD - incomplete return - taxpayer will return
		Check for PAPER FILED ONLY									Federal Return Sent/Acknowledged	State Return Sent/Acknowledged	
1) Federal Return (Current Yr)	2) Federal Return (Prior Yr)	3) Federal Return (Amended)	4) State/Local Only Return	5) Question & Answer Only									
1	Archer, Andy					EA	MM	F/S	X				Fed/State Returns ready for efile
2	Baker, Bob	√				EA	LC	No					Fed.State Returns to be paper filed
3	Goldberg, Gil and Gladys	√				EA	MM	No					Fed/State Retrurns to be paper filed
4	Coolidge, Cindy					EA	LC	S	X				State Return ready for efile
5	Daily, Denise				√	EA	MM	No					State Return to be paper filed
6	Ethridge, Earl and Emily		√			EA	LC	No					Prior Year Returns to be paper filed
7	Fitzgerald, Frank and Francine	√		√		EA	MM	No					Fed/State Returns and Amended Year Returns to be paper filed
8	Holden, Harry and Helen					EA	LC	F/S					2nd signature Needed
9	Koffman, Kay					EA		F/S					Add'l info needed to complete return
10	Illiano, Ingrid and Ian					MB	MM	F	X				Fed Return ready for efile
11	Jones, John				√	EA		No					No returns prepared
12	Levine, Larry					MB	LC	F	X				Fed Return ready for efile; State Return to be paper filed
13													
14													
15													
ACTIVITY TOTALS:		3	1	1	1	1							

**UPDATED 2012 COUNSELOR INSTRUCTIONS ON BACK OF FORM\***

Only Paper-Designated Sites report QR Totals

\*Also visit Tax-Aide Extranet, Training tab for Activity Reporting Examples & FAQs. [www.aarp.org/tavolunteers](http://www.aarp.org/tavolunteers)



[Col 8, 9,10 & (ERO Only)] Have been added to assist EROs with tracking e-file submissions and acceptances  
See ERO training documents under the Extranet Technology tab for suggestions on how to use these columns

## Activity Reporting Instructions

The Activity Reporting Log is used to record the services provided to Taxpayers.

A complete and accurate accounting of services is necessary to justify program funding from our IRS and AARP sponsors.

### General Instructions on How to Complete the Form:

- 1) Enter the site SIDN and activity date.
- 2) Enter the Taxpayer's name and record all services provided to the Taxpayer BEFORE calling the next Taxpayer.
- 3) Check (√) all applicable boxes to indicate the type of service(s) provided.
- 4) Multiple lines per Taxpayer may be used to facilitate tracking e-filed submissions.

## VERY IMPORTANT - 2012 INSTRUCTIONS

Answer the following question BEFORE using the Activity Reporting Log: (The District Coordinator knows the answers.)

Is the site an "E-File" or "Paper" Site, as designated in the Site Management System / Site Locator?

### *E-File designated sites*

- 1) Record **Only Paper Filed** (Not e- Filed) Current Year Federal Returns - Column 1
- 2) Record **Only Paper Filed** Prior Year/Amended Federal Returns, State/Local Only Returns and Q&A Only - Columns 2-5
- 3) Record Counselor Initials - Column 6
- 4) Record Quality Reviewer Initials - Column 7
  - ALSO Record Quality Review Initials for Tax Wise prepared returns in Tax Wise (Preparer Use Field #14)
- 5) Confirm that all required signatures are on Form 8879 - Column 9. **Paper-filed returns do not require Form 8879**

### *Paper designated sites*

- 1) Record **All** Paper Filed Current Year Federal Returns - Column 1
- 2) Record **All** Prior Year/Amended Federal Returns, State/Local Only Returns and Q&A Only - Columns 2-5
- 3) Record Counselor Initials - Column 6
- 4) Include Quality Reviewer initials - Column 7
- 5) Form 8879 - Column 9 **Paper-filed returns do not require Form 8879**

### Definitions:

**State/Local Only Return** - A State/Local return that was prepared WITHOUT filing a Federal Return

**Questions and Answers Only** - Assistance provided WITHOUT preparation of a Federal or State/Local Return; appointment taking should NOT be counted.

### Supervisor Tips:

Totals are calculated by counting "1" for each √ in Columns 1-5 [all sites]. *Only Paper-Designated sites count the number of initials in Column 7.*

Totals are reported using the **Portal Activity Reporting System** - Instructions at [www.aarp.org/tavolunteers](http://www.aarp.org/tavolunteers)

Any omissions in a reporting period can and should be reported in the following reporting period