Quick Reference Guide to Helping Taxpayers with Disabilities

**Issue:** AARP Foundation Tax-Aide sites have a responsibility to take reasonable steps to assist taxpayers who have disabilities that make it difficult to access services. Site volunteers should not tell a taxpayer that they cannot assist, or that he/she must go elsewhere to get services.

Under the Americans with Disability Act (ADA), tax sites should first identify what “accommodation” the taxpayer is requesting, and then evaluate how they will respond. The term “accommodation” refers to additional or unusual services or steps taken to ensure that the disabled taxpayer can receive a service.

**Four Key Questions**

If a taxpayer advises a tax site that they require an accommodation under the ADA, ask the following questions:

- What specific accommodation is requested as a result of the disability?
- Is there a friend or family member who could assist in meeting the requested accommodation?
- Would it be acceptable to have a volunteer provide whatever accommodation is requested?
- Are there community resources that the taxpayer has used in the past that could be contacted?
- Is the taxpayer willing to wait a reasonable amount of time to file a return to permit the site sufficient time to meet the request for accommodation?

**Action Steps**

- Once it is clear what accommodation is requested, determine if there is a volunteer who has the necessary skills (i.e. fluent in sign language) to meet the accommodation. You might check with the District Coordinator and/or State Coordinator to see if a volunteer might be available at another site.
- Determine if there is a way to meet the needs of the taxpayer without using external resources (i.e. using written notes to communicate with a deaf taxpayer rather than using a sign language interpreter)
- Check in the community to see if there are no-cost resources for helping persons with the stated disability. This could include non-profit groups, churches, universities, etc.
- Ask professionals to donate their time to assist (for example, many professional deaf interpreters will waive their fees to help a deaf person obtain needed services)
- If none of the above steps work, contact the National Office at 202-434-2197 to get assistance.
Points to Remember

- A disability might be obvious or subtle. Volunteers do not need to know all the details of the disability, but do need to know what the taxpayer needs in order to receive services.

- Don’t make assumptions about a person with a disability. Not all vision-impaired people use a white cane or seeing-eye dog. The required accommodation for a vision impaired person might be to turn the overhead lights partially off because he can’t read print in a brightly lit room. **Let the taxpayer define what accommodation is needed.**

- Written communication might not be sufficient for deaf taxpayers. Many older deaf citizens are functionally illiterate. If a deaf interpreter is requested, ask what type of interpretation is requested as there are different types.

- If you are using a deaf interpreter, talk directly to the taxpayer, not to the interpreter. When speaking with someone who reads lips, look directly at the individual, face the light, speak clearly, in a normal tone of voice and keep your hands away from your face.

- Ask if the disabled taxpayer would like assistance before your give it—don't assume that you need to push a wheelchair-bound person. Do not take mobility aids (walkers, cane, etc.) away from users unless they request it or it is required for safety reasons. If it is necessary to place it elsewhere, let the user know exactly where there equipment is being placed.

- Treat taxpayers with mental disabilities with the same respect given to all taxpayers.

- When working with speech-impaired taxpayers, if you do not understand something the individual says, do not pretend that you do. Ask the individual to repeat what he or she said and then repeat it back.

- Site Coordinators should make sure that the location is handicap-accessible (wide bathrooms, ramps, parking spaces etc.) and that all barriers are removed from entrances (i.e. snow shoveled enough to permit a wheelchair). Are there sufficient signs to let disabled taxpayers know how to enter the site?

- “Reasonable accommodations” could be as simple as providing a chair for an older taxpayer to sit in, or getting a glass of water for someone to take a pill. Think how you would like to be treated if you had a disability, and it will be easy to know how to help.