AARP Taxpayer Daily Computer Sign-In/Sign-Out Process TY 2022

Log-on the Computer and Prepare the Daily Sign-in/Sign out Form

1. Open the Chrome Book
2. Sign onto the computer when the prompts appear
    a. Your User name (9 digit AARP number @aarpfoundation org)
    b. Your Password:
3. Click on the TAX AIDE Links Button in the upper left corner
    a. Then choose google links
    b. Then google drive
4. Your sign in sheet should appear under the "My Drive" or the "Shared Drive option in the left hand column.
5. Double Click on the **correct** Sign in Sheet for the site and time period.
6. On the bottom of the screen, your will see "Day 1" "Day 2" etc. Click on whatever day you are on. **Rename** that day with the correct **date**. (For some places only open 1 day a week, the second week will be day 2.)
   Remember: At Colony Cottage there are 6 days for the week and 3 separate sheets for the months.
   THEN: In the box under the "Sign in Sheet" on the right hand side enter the current date (ex. 2/4).
7. The **ALL CAPS** buttons are **ALT+Search. Enter information in all capital letters.**

Enter the Primary Taxpayer Name in ALL CAPS

Legal Name--Last name, first name JR.

One name for each return	Accuracy imperative	No skipped lines
Common Errors: Nicknames	Reversed names	Misspelled names
Empty lines	TP entered twice	Non-primary TP listed first

Be sure there are no empty spaces at the beginning of the name.

If widowed, the surviving spouse is entered as the Primary Taxpayer.

Record data in the appropriate column:

If the taxpayer is a "**Walk-In**" place an **X** in the "Walk-In" box.

If the return is a "**Family and Friends**," place the Counselor's 4 digit number in this box. They will need to tell you, and most often they give you these folders in the morning. The QR will be done on them as time allows.

VERIFY the taxpayer's spelling of their name from the I&I. Sometimes it is spelled incorrectly on the envelope. (If this happens, please correct the name on the envelope also)

Call the taxpayer from the waiting area, and assign them to the desired table number (counselor).

Record the 4 digit Counselor number to whom the TP is assigned.

This will also automatically place a time entry.

Sign the taxpayer out:

All taxpayers who have Sign-In, must have a Sign-Out.

Taxpayers will Sign-out by coming to the CF registration desk and showing their AARP tax envelope. (QR usually comes with them)

Record the 4 digit number of the QR person in the column that describes the TP's Retur

In most cases, this will be **"Return Complete"**

The ERO will complete the last column when the return is e-filed

-If the return is **NOT complete**, place the QR or counselor's 4 digit number in the box identifying the reason for not being complete. (Needs signature, needs tax info, out of scope, etc.)

Comments: Please add a comment for most returns that are not complete.

Do not go outside of the comment box (be brief)

Write the reason for Out of Scope (i.e. rental, K-1, Business loss)

If they need tax documents, type what is missing in the comment box (Broker statement, W-2, 1099-INT, check, etc)

Any missing information should be listed on the envelope as well so the taxpayer knows what they need to bring back.

Place a sticker on the envelope that tells the client to return by 8:30 am

Amended Returns: 2019, 2020, 2021 returns—record the year that was amended.

If multiple amended returns, record each year on a different line.

Return QR: This is for the taxpayer coming back with missing items Place an **X** in that return QR since you won't know who was the original counselor.

At the beginning of the day, ask if any of the TPs need to go to QR. Ask to see their TP envelope with the routing form so you know where to send them (back to a counselor, or to QR). Most sites will not see returning taxpayers after 10am, but check with the site coordinator.

If the TP is only going to QR, sign them in on the QR sheet also, put the date of the initial return in the margin of the QR sheet

Make a new entry for the TP returning and make a note in the comment section like "returned from Feb. 14 "

Anyone returning on a different day, gets a new entry. IF the taxpayer was able to find the missing information and returns quickly on the same day, you can just adjust that entry to the correct one (usually the QR number in "return complete."

Signature Papers (#8879) and Client Letter will be returned to the CF

1. CF accepts both papers and checks the #8879 form for the signatures needed.
2. Taxpayer signs their name on the #8879 Daily Return Log
3. Taxpayer keeps their Tax form.
4. **CF keeps the Client Letter** (8879) and enters 8879 in the return complete.
5. CF will **enter the taxpayer's name.** and place a **X** in the **Return Signature column**
6. In the **comment section** put the date the return was originally done. This makes it much easier for the ERO to rectify the return and e-file it.
7. Give the ERO the Client Letter.

Sorting the Sign-in/Sign-Out Form by Name

1. **Make sure your cursor is in column A (first column) on a name**
2. Click on the word **Data** at the top of the spreadsheet
3. Never touch other dropdowns in the columns
4. Select "**Sort Sheet by column A-Z. (this will arrange names from A-Z).**   Do this frequently during the day. It will help you find the client more easily.

Q&A Box: Located under the DATE. Enter the total number of questions and answers that CF's gave to taxpayers during the day.

Closing down the Sign-In/Sign-Out Form

1. At the end of the CF Shift, ask the LC/SC if the computer is to be closed down, or to remain open.
2. To close, click on the **fan like object** in the **Box in the lower right corner.**
3. Click on the **power button** next to the sign out and it will shut down.

**if you accidently shut down the browser, click on the Google Chrome Icon and then click on the icon with 9 dots in it and select the "Drive Icon". This will take you back to the drive where you can reopen the spreadsheet.

12/20/2022