AARP Client Facilitator Daily Routine TY 2024

1. Put away purses and valuables in safe location.
2. **Help set up site and supplies (come a few minutes early)**
   a. ARRP poster is displayed as required
   b. Envelopes, I+I forms, pens, set on each CF desk area
   c. Appointment list for your use
   d. Chrome book (1) set up to make appointments
   e. Chrome book set up for entering client data, counselors on intake sheet
3. **WALK-IN list**: have available with times the Site Coordinator has given.
   a. **Taxpayers with appointments will always be seen first.**
   b. Give the walk-in taxpayer (TP) an **I+I** to fill in if they have not already done so
   c. Instruct the walk-in TP they can stay or return about 15 minutes before the time (if you need to review all their information). **This procedure may vary site to site.**
4. **TP returning to QR only: Ask** if there are taxpayers coming for QR only. If so, **tell the CF at the main desk**, and **put the TP name on the QR log**. These taxpayers get seen right away in the morning, in general. Generally, they were missing some documents.
5. **Greet taxpayer(s) with scheduled appointments.**
   a. Verify their appointment with your appointment list
   b. **Check IDs**
   c. Verify that **this year's I+I** is completed. If it is not done, give them a copy and ask the person to complete it and return it when they are done.
6. **Review I and I**
   a. Use a **RED pen** to change or correct other answers as needed.
   b. Explain the **3 consents** in the I+I to **TPs** and request them to **sign** (especially first 2 forms). If they decline, mark with an **X** across page, or write "declined"
7. **Put basic documents in order**. If you are limited on time, give the taxpayer a copy of the order of tax documents, and they can put them in order. (Counselor will do itemization order unless you have time)
   a. **Prepare the AARP Envelope using a black sharpie pen: 2024 can be entered on all envelopes.**
   b. **PRINT** the **Primary taxpayers NAME on AARP envelope—Last name first, then first name in CAPITAL LETTERS.** Please may sure the name is spelled correctly.
      i. You can add the spouse's name (counselors generally like this)
   c. **APPOINTMENT TIME** in right hand corner
   d. If the TP is a **WALK-IN,** add **WI** below the time
   e. Place the completed and reviewed **I+I** in the envelope
   f. Make sure taxpayer knows it may take **2-3 hours** and one person must stay in the room.
8. **RETURN** all other paperwork and tax documents back to the taxpayer and ask them to sit in the waiting area until they are called for their appointment.
9. **CF should give the AARP envelope to the CF at the main computer desk** for spreadsheet entry.
10. Call the next taxpayer.
11. One CF should be making **appointments,** but not until everyone with appointments has been processed.
12. At the end of the day, clean up work area and put supplies away.