#6 D45 Training Update TY24 - Intake & Interview Booklet

Our first week is over! It was a busy week, and many issues were resolved to get us started with helping our taxpayers. Thank you for your patience through this process. Here is one issue for follow-up.

As you remember from training, we have a new Intake & Interview Booklet. This means there is new direction on how to fill it out. This direction comes from the National Tax Training Committee arm of AARP and is directed by the IRS. Its purpose is to ensure a complete and thorough interview with the taxpayer(s).

Here are the directions related to completing the I&I. Please read carefully.

CLIENT FACILITATOR DUTIES:
- Make sure that the taxpayer has completed the unshaded white portion of the booklet to the best of their ability. Help the taxpayer sort and organize their papers.
- You can answer any questions that are not tax law related. (e.g. Explaining the consents or what the optional questions are for and if they must be completed). Any Tax or Scope Questions that may arise should be immediately reviewed with the Local Coordinator or a Certified Counselor designated by the Local Coordinator.
- Questions 20-23 on page 6 of the booklet are not to be answered. The online version and new printings of the booklet will not include these questions.
- The Local Coordinator may assign some of the above work to be completed by certified Counselors as a local option. Client facilitators not also certified as counselors may not fill in any items in the shaded areas.

COUNSELOR DUTIES:
- Conduct an interview with the taxpayer(s) reviewing the ENTIRE booklet with them.
- Indicate in the shaded portion of the booklet (pages 1-3) that you have questioned the taxpayer on each item in the shaded area by making a check mark in EACH BOX. This is done with a red pen. (The shaded sections on pages 1-3 is not a list of what tax items the taxpayer has. It is a list of all the items you have asked the taxpayer(s) about.)
- There are two shaded areas on page 1 of the I&I that are often missed. Mark Yes or No to the first question about anyone else claiming the taxpayer(s). Mark Yes or No in each relevant column in the second shaded (dependent's) section or N/A in the shaded section as a whole.
- Answer any questions or unresolved issues on the booklet or uncovered during the interview process.
- Make any notes on the booklet that help you or the Quality Reviewer complete the return.

QUALITY REVIEWER DUTIES
- Conduct an interview with the taxpayer(s) reviewing the ENTIRE booklet with them. Let them know you will be asking many of the same questions the preparing counselor asked them so that you can provide them with a correct and complete return. If any box in the shaded area on pages 1-3 has not been checked, be sure to check the box after you ask the taxpayer about it. After you complete the return, send a gentle reminder to the counselor to ask about all items and check all the boxes in the shaded section, if needed.
- Review all notes entered by the preparing Counselors.
- Answer any questions or unresolved issues on the booklet or uncovered during the Quality Review process. Make additional notes on the booklet as required. Connect back with the counselor in person or through Messages as needed.

Although thorough questioning has always been the intention, this is a change in our habits and will take some time to get used to. Please be thorough in following these directives. Let us know if you have any questions. Your LC/SC can also answer questions for you.

Thank you for your dedication to this important work!