

AARP Client Facilitator Daily Routine TY 2025

1. Put away purses and valuables in safe location.
2. **Help set up site and supplies (come a few minutes early)**
 - a. AARP 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: 2025 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 make 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.