AARP Taxpayer Daily Computer Sign-In/Sign-Out Process TY 2025

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 enter:
    a. Your email: **9 digit AARPnumberty24@aarpfoundation org**
    b. Your Password:
3. Click on the TAX AIDE Links Button in the upper left corner
    a. Choose google links
    b. Then choose google drive
4. Your sign in sheet should appear under the "**My Drive**" or in the "**Shared Drive**" option in the left hand column.
5. Double Click on the **correct** Sign in Sheet for the site and time period.
    a. Some of you are working multiple sites. Each site has their own sheet.
6. On the bottom of the screen, your will see "Day 1" "Day 2" etc. Click on whatever day you are on.
    a. **Rename** that day with the correct **date**. (For some places only open 1 day a week, the second week will be day 2.)
    b. 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 together.**
8. **Enter information in all capital letters.**
9. **Colony Cottage** has 3 sheets (Master, Colony Cottage 2 and Colony Cottage 3) Will switch with the month. Make sure you are in the correct sheet.

Entering Data on the Spreadsheet:

1. **Enter the Primary Taxpayer's Name in ALL CAPS (**starting on line 7). Now 2 fields
    a. Legal Name--Last name, first name (JR if needed)
    b. If the female taxpayer was widowed this year, the FEMALE's name is entered
    c. One name for each line.   Accuracy is imperative
    d. No skipped lines
    e. **VERIFY the spelling of the taxpayer's name from the I&I**
        i. Sometimes the last name is spelled incorrectly on the envelope or hard to read.
        ii. If the spelling is incorrect on the envelope, please correct that also.
    f. **Common errors**: Nicknames, first and last name reversed, TP name entered twice, **non-primary TP listed first**, Misspelled names, empty lines
2. **Counselor:** Enter the Counselor number when you call and assign the TP to a counselor. (Time is no longer being monitored.)
3. **Site:**   If different than the site listed in main title, put in where return was done. Use abbreviation.
4. **Walk-In:** Place an **X** in the walk-in column if the TP is a walk-in.
5. **No Show:** Enter the client's name and put an **X** in the box if they did not show. You can make a comment in the comment line, such as "called and left message" (You will not have to keep track of no-shows any more since Charlie Couckuyt will now have accurate data to evaluate from the spreadsheet.)
6. **Friends and Family:** Counselors can do family and friends returns at home on a Chrome Book, but the counselor must bring the return in to have it Quality Reviewed (QR). The counselor generally gives you these tax payer's names right away in the morning. The TP name then gets entered on the QR sheet with a F+F in front of it (usually by the counselor bringing the forms). Generally, the site coordinator is supposed to give out the F+F returns to be QR'd. These returns get done as time allows but should never take precedence over a waiting TP
    a. **Enter the Counselor's number** into the Family and Friend's box.

7. **Return to QR:** This column is for the TP returning with missing data. Most often this will happen first thing in the morning.
    a. Place an **X** in this column as the TP is not going to a counselor (just QR)
    b. In Comment section, make a note like “from 2/24.
8. **Need signatures:**
    a. **Enter** the **QR’s number** in this line for taxpayer’s who must return with a signed 8879 letter **and** documents.
        i. **Also,** enter the date out, and taxpayer name on the 8879 return sign in log on the clipboard.
    b. **Technically, Family and Friend’s returns should go in this column after they have been QR’d as well, because the counselor needs to get the signature.** (sometimes, the QR will tell you to put their number in the **return complete** line)
9. **Return Signatures:** This column is for a TP returning with a signed 8879.
    a. The CF accepts both the #8879 and AARP letter and **verifies that the needed signatures are present.**
    b. Taxpayer keeps the # 8879 and other tax forms.
    c. The CF enters the TP name in the name column and an **X** in this column.
    d. **In Comments:** Type in the date the actual return was originally done. (This helps the ERO be able to find the return easier and submit it.
    e. **The CF keeps the letter and places it in the folder to give to the ERO.**
    f. On the 8879 log on the clipboard, indicate the date returned and add your name to the “Received By.”
10. **Need tax info:**
    a. **Enter the number of the last person to see this person**. It could be the counselor or the QR.
    b. In the Comment column, briefly enter a short note of what the TP is missing. (1099 R, W2, etc)
    c. The counselor or QR should also write the missing info needed on the envelope.
    d. The TP should be instructed on who they need to see on their return. Most times, they will be told to come back right away on a morning and go to QR.
    e. Sometimes, the TP is missing too much critical data and will need another appointment scheduled
    f. Place the **STICKER** on the envelope instructing client when to return
11. **Tax Law Hold**: Enter the number of the last person (QR or counselor) to work with the client.
    a. Hopefully, we will not need to use this column this year.
12. **Ready to E-file**:
    a. **Enter the number of the QR who finished the return**. The taxpayer is done, and has all their information!! The return will be e-filed shortly by the ERO.
    b. **Tell the TP “Thank you and see you next year**.”
13. **E-filed Return**:
    a. The **ERO** will enter a “**T**” for transmitted,
    b. The **ERO** will be changed the **T** to an “**A**” when the return has been accepted by the IRS.
    c. The **ERO** will change the **T** to “**R”** if the return was rejected by the IRS.
14. **Paper**: Very few returns are filed on paper. QR must give the reason.
    a. If the TP is getting a paper return, the QR number gets placed in this column (even though the return is complete, it will not be e-filed.)
15. **Amended:**
    a. **Enter the number of the QR who amended the return** in this column**.**
    b. In the **Comment** column, enter the year that was amended (2025).
    c. This year, amended returns from 2022, 2023, and 2024 will be done on a separate spreadsheet by John Krier and Amy Soeder.

16. **Q+A:**
    a. Sometimes a client gets all the way to a counselor and just has a question, and no return was started. Put an **x** in the box.
17. **Out of Scope:**
    a. Enter number of counselor or QR who last saw the TP in the Out of Scope column.
    b. In comments, write why return is out of scope (rental, K-1, solar, etc)
18. **Declined to file**:
    a. Enter the number of the last person (QR or counselor) that worked with the TP.
    b. Generally, TP didn't like the results of the tax return done by Tax-Aide
19. **Extension: Unusual unless at the end of tax season.**

All taxpayers who have a Sign-In on the computer, must have some disposition.

Other Notes:

1. Anyone TP returning on a different day, gets a new entry. IF a TP was able to find the missing information and returns quickly on the same day, you can adjust the entry to reflect the updated status. (usually "return complete" or they brought back the 8879 form right away)
2. Amended Returns for prior years (2022, 2023, 2024) will be done starting in **March** only at Colony Cottage (on Wednesday mornings).
3. Amended Returns for the current year can be done at the site where they were originally done, but the return must have been accepted by the IRS and any payments cleared, to prevent confusion on the government's part.
4. Tax-payers will sign-out by coming to the CF registration desk and showing you their AARP envelope. Generally, the QR comes with them.

Sorting the Sign-In/Sign out Form by Name

1. You will want to sort the client names often during the day.
2. Make sure your cursor is in Column A (first column)
3. Click on the word **Data** at the top of the spreadsheet.
4. Select "Sort Sheet by column A-Z. (This will arrange last names A-Z)
5. Never touch other dropdowns in the columns.

Q&A Box (located under the Date in the top right)

1. Enter the total number of questions and answers that CFs and the site leader gave to clients during the day.
2. CFs are being asked to keep better track of Q+A (issue with funding)

Closing Down the Computer for the Day

1. At the end of the CF shift you should sign out.
2. If a new CF is taking over, that person should sign in and return to the same sign-in sheet.
3. At the end of the day, ask the SC if you should shut down or leave the computer open for them to finish.
4. To shut down, click on the bottom right by the time and date.
5. Hit the power button on the left to shut down.
6. If you are taking the Chrome Book home, make sure to bring it back fully charged.

****if you accidently shut down the browser, click on the Google Chrome icon , and then Tax-Aide links, Google links, Google drive where you can reopen the spreadsheet) (1/13/2026**