

AARP TAX AIDE



Volunteers who work in our AARP Tax Aide station assist and advise local seniors when it comes to preparing and filing taxes. This free tax program helps seniors receive quality financial services and advice at no cost.

MEMBERS OF THE GROUP MUST BE WILLING TO:

- Agree to COGENT Background Check
- Understand HIPAA and observe strict confidentiality practices
- Track time by scanning into MySeniorCenter System
- Be certified and trained annually through the IRS
- Take and pass IRS Certification Test with an 80% grade or higher
- Attend a 4-Hour ethics training
- Must have some computer skills and be willing to be trained on various computer software programs

DUTIES MAY INCLUDE:

- Prepares tax forms and/or answers questions to the extent of his/her current tax training
- Reviews prepared tax return with tax-payer for accuracy, tax-payers are responsible for accuracy of the return
- Adheres to schedules and guidelines

(continued duties)

- Accepts no money or other gratuity for services
- Maintains strict confidentiality and protects the security of all taxpayer information and records at all times
- Adheres to program policies and procedures specifically the Counselor Guidelines and Confidentiality and Security of Taxpayer Data sections in the Client Service Provider Digest
- Promotes and supports the program through word-of-mouth and wears an AARP Foundation Tax-Aide name badge while serving at a site
- Records assistance given and Quality Review completed as outlined by the Local Coordinator
- Works well with diverse populations and treats clients and other volunteers with respect