

## FREQUENTLY ASKED QUESTIONS

Q What is required to be a Tax-Aide counselor?

A The basic requirement is a willingness to serve basically an underserved population of low and moderate income individuals and families prepare their Federal and Massachusetts state income taxes. All volunteers must submit a CORI request and have an e-mail account. Some computer literacy is desirable.

Q What are the volunteer positions that I can apply for?

A Some of our volunteers wear many hats and most Districts use a team approach, sharing responsibilities across titles. However, Tax-Aide offers a range of meaningful leadership and tax counseling opportunities. Training is provided for each position, usually at District level.

### Client Facilitator(CF)

Client Facilitators greet taxpayers upon their arrival at a tax preparation site and help them complete the necessary intake forms required. They also check that proper identification is confirmed and may arrange income and other tax documents in preparation for the Tax Counselor.

### Tax Counselor (TC)

Counselors assist individuals with the preparation of their tax returns in accordance with the guidelines established between the IRS and the AARP Foundation.

### Training Coordinator (TrC) / Instructor

The Training Coordinator or Instructor is a tax counselor with at least several years' experience in the Tax-Aide program, with knowledge of Federal and Massachusetts tax law, and the tax preparation experience with the software used in the program. They are also selected because of their teaching ability. The State Training Specialist (TRS) conducts training classes each year to help with teaching methodology as well as new aspects of federal and state tax law.

### Local Coordinator (LC)

Local coordinators implement the AARP Tax-Aide program plans in one or more assigned geographic localities. The LC recruits, appoints, ensures adequate training, supervises, and evaluates Counselors (tax preparers).

### Technology Coordinator (TC)

Technology Coordinators work with the District Coordinators and members of the state-wide management team to implement, maintain and evaluate automated systems for tax service, administrative procedures and volunteer training. The TC coordinates technology-related responsibilities, including evaluating and recommending needed computer software and hardware to provide electronic filing.

### Communications Coordinator (CC)

Communications Coordinators (CC) work with the District and Local Coordinators to implement and maintain publicity and recruitment efforts throughout the local region.

### District Coordinator (DC)

District Coordinators implement AARP Tax-Aide program plans in one assigned geographic area. Districts are usually formed along county lines although the more populous eastern counties have several districts within them. The DC recruits, appoints, trains, supervises and evaluates Local Coordinators, Instructors, Communications Coordinators and Technology Coordinators. The DC monitors all activities in the District.

Q What type of training is involved with being a Volunteer Tax Counselor?

A Training for both new and returning volunteers is organized within a District. New volunteers receive 3 to 5 full days of training, where they will be oriented to Tax-Aide and learn basic tax law as well as being trained on using the tax preparation software provided by the IRS. After training, volunteers take the IRS's open books certification test (either on paper or online) on their own. (The online-line test is available at <http://www.irs.gov/app/vita/index.jsp>). After passing a Standards of Conduct and the Advanced exam (for counselors) with a score of 80 percent or above, they will be certified to prepare taxes for the entire season at a Tax-Aide site within their District. Client Facilitators need only to pass the Standards of Conduct test.

Returning volunteers must also pass the Advanced certification exam and are offered a refresher course covering tax preparation basics, as well as updates for the new tax year.

All volunteers should check their District or Local Coordinators to make sure that they are aware of the current Training Schedule with times and locations. Note: All volunteers are expected to attend appropriate training sessions.

Q If I certify as a Tax-Aide volunteer, where would I serve?

A There are over 200 Tax-Aide sites in Massachusetts, mostly located with Senior Centers or Council on Aging centers. There are, therefore, open during weekdays. Some sites in Libraries are open on Saturdays allowing volunteers who are not fully retired to participate. While your services are volunteered, the national program does provide reimbursement for travel mileage.

Q What is Tax-Aide's relationship with AARP and the IRS?

A Tax-Aide is sponsored through funds from the AARP Foundation, the Internal Revenue Service and through private donations. The AARP Foundation, with cooperation of the IRS, administers and oversees the national program through which the states and territories assume responsibility to organize, lead and promote the Tax-Aide program.

Q What kind of impact do volunteers have through their work with Tax-Aide?

A Every year, Tax-Aide helps low and moderate income individuals and families who must file their taxes save the fees and high interest rates associated with commercial preparers. In Massachusetts Tax-Aide volunteers help almost 30,000 low and moderate income persons and families yearly. Many are filing a Federal or Massachusetts return merely to get a tax refund or a credit such as the Earned Income Credit or Mass Senior Circuit Breaker credit.

Q How can a volunteer be sure that he/she is not liable for a possible error on someone's tax return?

A Tax-Aide volunteers are covered under the Volunteer Protection Act of 1997 (S.543) which provides that certified Tax-Aide volunteers are not liable for harm caused by an act or omission if they're acting within the scope of their responsibilities and the harm was not willful.

Q What taxpayers are served by Tax-Aide?

A Tax-Aide aims to serve low and moderate-income taxpayers and families with special attention to taxpayers 60 years and older. We do not discriminate on the basis of age, race, religious belief, gender or sexual orientation, or place of residence.

Q Do people who wish to volunteer with Tax-Aide need to have any specific skills and/or characteristics?

A No, Tax-Aide welcomes all volunteers who wish to make an impact in their communities. Basic computer skills are necessary and most of our communications I now through email or internet. We simplify the tax preparation process as much as possible in order to enable anyone – including volunteers with no prior knowledge of tax law or tax preparation software – to learn how to prepare quality, accurate tax returns. Our training is designed to teach tax preparation using IRS provided computer software that simplifies the preparation process to create a user-friendly experience. Volunteers are also provided all of the necessary resources for more complicated returns or tax situations, including experienced on-site volunteers.

Increasing the diversity of person we can serve is a major goal to the Tax-Aide program.

**Volunteers fluent in Spanish, Haitian Creole, Somali, Portuguese, Vietnamese, and other foreign languages are particularly needed, especially for our Tax Counselor positions.**