ERO/Transmitter Training

TAX-AIDE

AARP FOUNDATION

Outline

- Primary Duty
- Responsibilities
- Qualifications
- Efile Process

Primary Duty

- **Electronically file Federal and State tax returns with the IRS and State tax agencies using TaxWise software after returns are Quality Reviewed and signed by the taxpayer(s)**

Responsibilities

- Establish a process to insure all returns are promptly submitted
- Track status of all returns from creation to acceptance
- Receive return acknowledgments
- Ensure all rejects are promptly corrected and accepted or returns converted to paper

Responsibilities (cont)

- Reporting statistical accomplishments as required
- Answer questions and address anomalies that occur during return preparation and electronic filing
- Do not retain any taxpayer data unless specifically authorized, i.e., associated with Form 8453

Qualifications

- Certified as a AARP Foundation Tax-Aide Volunteer Counselor
- Proficient with TaxWise Online
- Have basic knowledge of personal computers, software, and electronic communication systems
- Maintains close working relations with counselors, LC, TC and others on e-filing of returns. In many cases the LC is the ERO/Transmitter

Track Returns from Submittal to Acceptance

- Use Activity Reporting, Quality Review Tracking Log -OR-
- Use Return Stage -OR-
- Use Paperless Tracking

Use Activity Reporting, Quality Review ERO Tracking Log

- Use Tracking Log to track status of federal and state returns, questions asked, paper returns or pending completion
- Tracking Log is available on the [OneSupport Help Center] [Portal Support][Activity Reporting][Site Activity Log Form]
- Site can modify form if needed to meet local needs

ERO Tracking Log

- **Also, site may use ERO Tracking Log to indicate status of return if not ready for e-file, for example:**
  - **8879 HOLD – Waiting for second signature on Form 8879**
  - **Taxpayer HOLD – Taxpayer needs to return with additional information to complete the return, etc.**

ERO Tracking Log

Activity Reporting, Quality Review & ERO Tracking Log

Page

Activity Reporting							E-file Tracking				
Type of Service									ERO ONLY		
Check for PAPER FILED ONLY											
1) Federal Return (Current Yr)	2) Federal Return (Prior Yr)	3) Federal Return (Amended)	4) State/Local Only Return	5) Question & Answer Only	6) Counselor's Initials	7) Quality Reviewer's Initials	8) Federal / State to be e-filed	9) 8879 signed by all Taxpayers	Federal Return Sent/Acknowledged	State Return Sent/Acknowledged	10) Comment Examples: **NNTF** - No Need to File **OOS** - **Reason** (why return is Out of Scope) Amended **Tax Year** Prior **Tax Year** (use a separate line for each year) **Federal Only** (no State Return) Reason for Paper Return **8453** - Reason form is attached for mailing **8879 HOLD** - (and/or state equivalent) **Signature(s) Needed** **Taxpayer HOLD** - incomplete return - taxpayer will return

TAX-AIDE AARP FOUNDATION

Return Stage

- **Helpful in tracking return status**
- **Helpful in keeping the ERO/Transmitter informed on status of each return**
- **All volunteers can update Return Stage each time a return is changed**

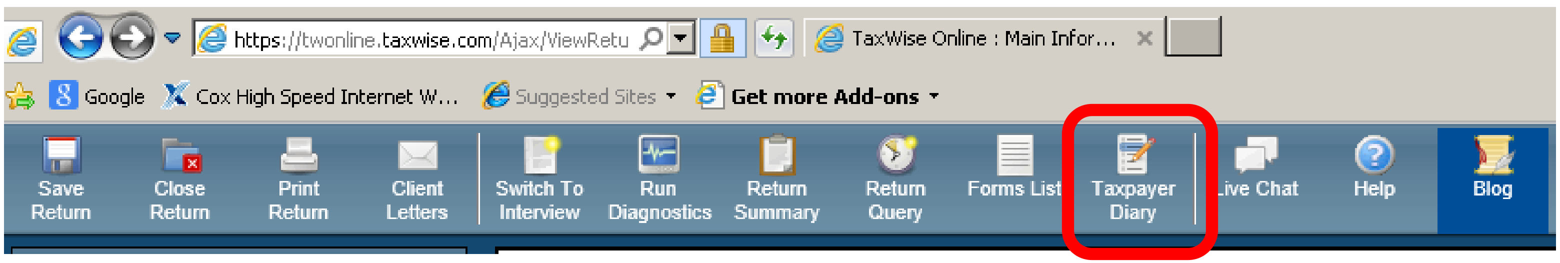
TWO Site Paperless ERO Tracking

- **Efile tracking can be paperless using TWO [All Returns]**
- **Can sort by[TIN][NAME][US e-File][State e-File][Stage] [Date][Username]**
- **When return prepared, Quality Reviewed, e-Files created and Return Stage set, information shown in [Active Return]**

Return Diary Information

- Taxpayer Diary key for communication
- Used to record information about returns (and taxpayers)
- Select [Taxpayer Diary] in return and enter relevant information.
- Icon by TIN on ribbons can be selected to access information. Additional information can be added.
- Note: Information carries over from previous year. Can delete information in the diary as needed

Diary Initiated In the Return



TWO Diary Information

Active Returns

TIN	Name	US e-file	State e-file	Stage
[redacted]		Accepted		EFILE - READY TO FILE
[redacted]		Accepted	Create Failed	SEE DIARY INFORMATION
11-01-4062	KENT, KARL	Created	Created	EFILE - READY TO FILE
[redacted]		Accepted		EFILE - READY TO FILE

add a note save

johng: Saturday 3/16/2013 @ 10:48:29 AM

Partial year Arizona. Could not create AZ e file so paper filed AZ and created Federal e file.

E-file Process

- Quality Reviewer reviews return with taxpayer and explains that taxpayer is ultimately responsible for return
- Taxpayer(s) sign Form 8879
- E-file created and Return Stage set [Efile – Ready to File]
- Return submitted/transmitted after items 1 – 3 completed
- For rejects, correct mistakes and re-transmit
  - If more info required from taxpayer, have original counselor, if available, contact taxpayer

Ensure All Intended E-file Returns Are Transmitted

- Check Return Stage, set if necessary
  - Active Returns Window in TWO
- Complete ERO Tracking Log to see that all completed returns are accounted for
- Or check Active Returns log

Now Wait

- Federal and state acceptance estimated timeframes
  - 15 – 60 minutes – Federal returns
  - Time varies for State returns
- Review acceptances/rejections – if using ERO Tracking Log, update
- Correct rejects
- Provide feedback to all counselors

State Returns

- State returns submitted together with federal are held until federal return is accepted. Can then transmit State – Preferred
- State returns can also be submitted on their own by checking [unlinked] on state return.
  - Note: If state accepted and federal rejected may have to amend state return

A Return Was Rejected!

- Correct error
- New Form 8879 signatures needed if :
  - SSN or name changed -OR-
  - Change in total income or AGI is $50 or more -OR-
  - Change in total tax, federal tax withheld, refund or amount due is more than $14

Rejected Return (cont)

- Advise taxpayer of change and provide a corrected copy
- If cannot be e-filed, convert to paper
  - The taxpayer must mail the return
- Provide feedback to counselor, quality reviewer and LC

End of Season Actions

- Since returns will continue to be available to preparers, to protect taxpayer information:
  - Move returns to the Admin user
  - Change all users to return preparer. Exceptions
    - Administrator
    - Select Administrator user(s) as backup
  - Deactivate counselors who will not be returning

End of Season Actions

- Computers returned to custodian (AARP computers) and person receiving shipment (IRS computers)
- Person who received IRS shipment must
  - Run WIPEDISK on computers
  - Return computers to IRS depot

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Questions?

Comments…