AARP Foundation Tax-Aide

Activity Reporting, Quality Review & ERO Tracking Log

Date(s) ______________

Site ID# ______________

Page ____

		Activity Reporting							E-file Tracking				
		Type of Service									ERO ONLY		
		Check for PAPER FILED ONLY											
	Client Name (also list those helped with questions and answers only) **Last Name, First Name(s)**	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** **Client HOLD** - incomplete return - client will return
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
	ACTIVITY TOTALS:												

Only Paper-Designated Sites report QR Totals

UPDATED 2012 COUNSELOR INSTRUCTIONS ON BACK OF FORM*

*Also visit Tax-Aide Extranet, Training tab for Activity Reporting Examples & FAQs. www.aarp.org/tavolunteers

D19597 (1011)

[Col 8, 9,10 & (ERO Only)] Have been added to assist EROs with tracking e-file submissions and acceptances
See ERO training documents under the Extranet Technology tab for suggestions on how to use these columns

Activity Reporting Instructions

The Activity Reporting Log is used to record the services provided to Clients.
A complete and accurate accounting of services is necessary to justify program funding from our IRS and AARP sponsors.

General Instructions on How to Complete the Form:

1) Enter the site SIDN and activity date.
2) Enter the Client's name and record all services provided to the Client BEFORE calling the next Client.
3) Check (√) all applicable boxes to indicate the type of service(s) provided.
4) Multiple lines per Client may be used to facilitate tracking e-filed submissions.

VERY IMPORTANT - 2012 INSTRUCTIONS

Answer the following question BEFORE using the Activity Reporting Log: (The District Coordinator knows the answers.)
Is the site an “E-File” or “Paper” Site, as designated in the Site Management System / Site Locator?

E-File designated sites

1) Record **Only Paper Filed** (Not e- Filed) Current Year Federal Returns - Column 1
2) Record **Only Paper Filed** Prior Year/Amended Federal Returns, State/Local Only Returns and Q&A Only - Columns 2-5
3) Record Counselor Initials - Column 6
4) Record Quality Reviewer Initials - Column 7
   - ALSO Record Quality Review Initials for Tax Wise prepared returns in Tax Wise (Preparer Use Field #14)
5) Confirm that all required signatures are on Form 8879 - Column 8. **Paper-filed returns do not require Form 8879**

Paper designated sites

1) Record **All** Paper Filed Current Year Federal Returns - Column 1
2) Record **All** Prior Year/Amended Federal Returns, State/Local Only Returns and Q&A Only - Columns 2-5
3) Record Counselor Initials - Column 6
4) Include Quality Reviewer initials - Column 7
5) Form 8879 - Column 9 **Paper-filed returns do not require Form 8879**

Definitions:

State/Local Only Return - A State/Local return that was prepared WITHOUT filing a Federal Return
Questions and Answers Only - Assistance provided WITHOUT preparation of a Federal or State/Local Return; appointment taking should NOT be counted.

Supervisor Tips:

Totals are calculated by counting "1" for each √ in Columns 1-5 [all sites]. *Only Paper-Designated sites count the number of initials in Column 7.*
Totals are reported using the **Portal Activity Reporting System -** Instructions at www.aarp.org/tavolunteers
Any omissions in a reporting period can and should be reported in the following reporting period