

# State Tax Assistance Program

 **AARP** Foundation<sup>®</sup>

# State Tax Returns

- **Situation: Taxpayer requires return from another state which the counselor has not been trained to prepare**
- **Options:**
  - Turn taxpayer away
  - Ignore other state return
  - Rely on TaxSlayer to *get it right*
  - Get help to complete other state return

# State Tax Assistance Program

- **Formalized system to obtain assistance from counselors in another state**
- **Triggered through OneSupport Help Center Ticket System**
- **Counselors use phone and TaxSlayer**

# State Tax Assistance Program

- **Experienced volunteers provide assistance on their home state tax returns**
- **Not “instantaneous” – second visit for taxpayer necessary to complete returns**

# Asking for Help...

- ***Submit a Request* through OneSupport**
  - Counselor contact info
  - Brief description of taxpayer situation
- **Out-of-State “Assisting” Volunteer contacts  
“Requesting” Counselor**
  - Conversation to answer questions
  - Log in to local TaxSlayer account to review return

# TY 2016 States

**Tickets per state**

**Versus  
131 in 2015**

Requesting State	#	Assisting States	#
Florida	43	New York	28
Georgia	19	Michigan	13
Michigan	7	Pennsylvania	11
Kentucky	4	Georgia	8
Ohio	4	Illinois	7
Arizona	3	Indiana	5
Indiana	2	Ohio	4
New York	2	South Carolina	4
Oregon	2	Kentucky	3
Illinois	1	Missouri	2
New Hampshire	1	Wisconsin	2
Wisconsin	1	Oregon	1
<b>Grand Total</b>	<b>89</b>	Rhode Island	1
		<b>Grand Total</b>	<b>89</b>

# Plans for TY 2017

- **Continue to offer program**
  - **Encourage more states to participate**
    - **RCs – discuss with SCs**
    - **Will ask for opt ins as Assisting State and/or Requesting States**
  - **Improve awareness by sites/volunteers**

# State Tax Assistance Program

Questions...



Comments...