

Service Delivery Models

Tax Year 2020

■ Service Models and Status

- Traditional In-Person - **Approved**
- Modified In-Person - **Approved**
- Traditional Scan Model - **Approved**
- Virtual Low-Contact Model- **Approved**
- Virtual Contact-Free Model – **Approved**
- ATP Model – **Read Ahead**
- Drop Off Model – **Pending IRS – Pub 5408**

■ Service Models Requirements

- **Appointments** required for all In-Person models
- AARP Matrix determines which model(s) – slide 13
- Meet State, County , City and Host Site requirements
- Adequate Volunteers to staff Tax Site
- Virus Mitigation Plan for In Person models – slide 15
- Taxpayer Compliance with PPE requirements

■ Traditional – In Person

■ Traditional In-Person:

Our standard in-person tax assistance

- Appointment required
- Additional requirements
 - Space for Social Distancing
 - Surface sanitizing between taxpayers
 - Volunteers and Taxpayers
 - Face coverings – mask, shield, cover
 - Temperature check
 - Hand washing (Volunteers)

■ Modified In Person

■ Modified In-Person:

- Appointment required
 - Traditional requirements +
 - Additional requirements
 - Taxpayer(s) complete Intake interview
 - Taxpayer(s) remains “near” the tax site
 - During preparation
 - Available by phone
 - Taxpayer(s) completes QR review *
- * - May be done remotely (LC)

■ Modified In Person

- “Near” tax site:
 - Taxpayer remains within vicinity
 - Car
 - Waiting Area – with separation
- Taxpayer(s) **remain in the vicinity** until the return is complete.

■ Modified In Person

■ Contact is the KEY

- Only one point of contact - Intake

Taxpayer has appointment

Intake Booklet, ID verified & Interview

Tax envelope > remote preparer

Taxpayer remains **in the vicinity**

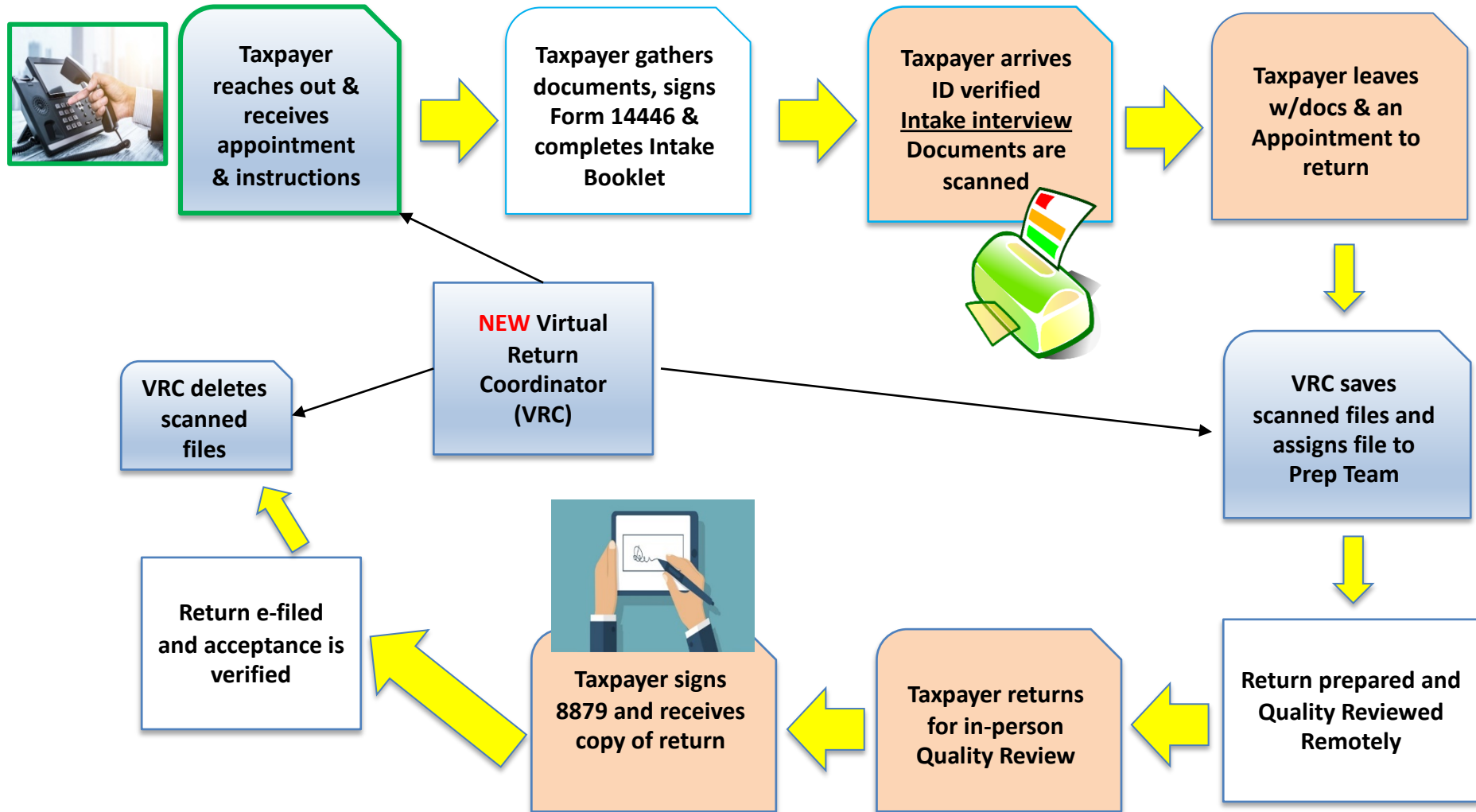
Mall, food court, store or car

Taxpayer provided printed tax return

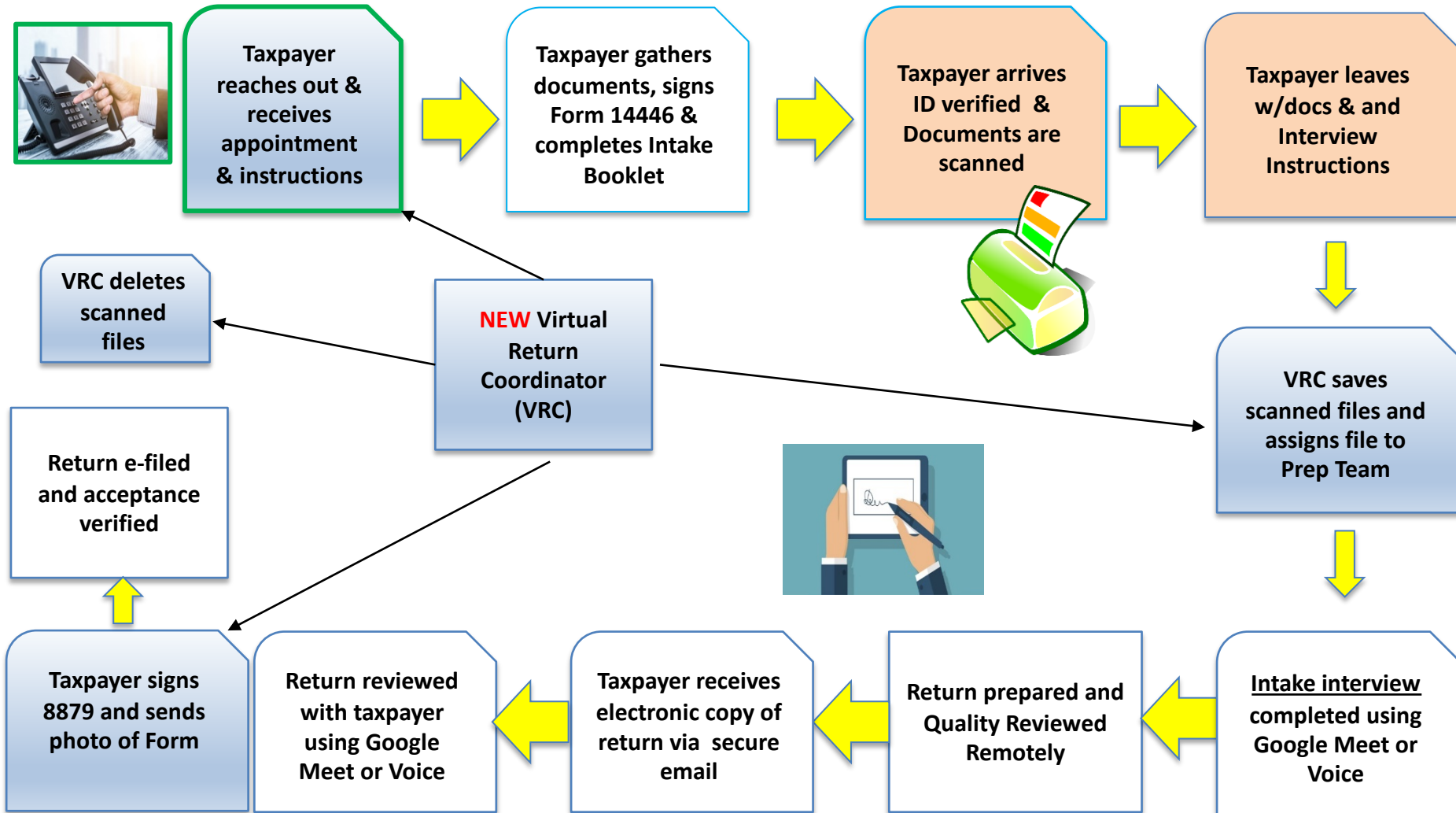
QR by phone, Taxpayer signs 8879

Taxpayer leaves with all documents

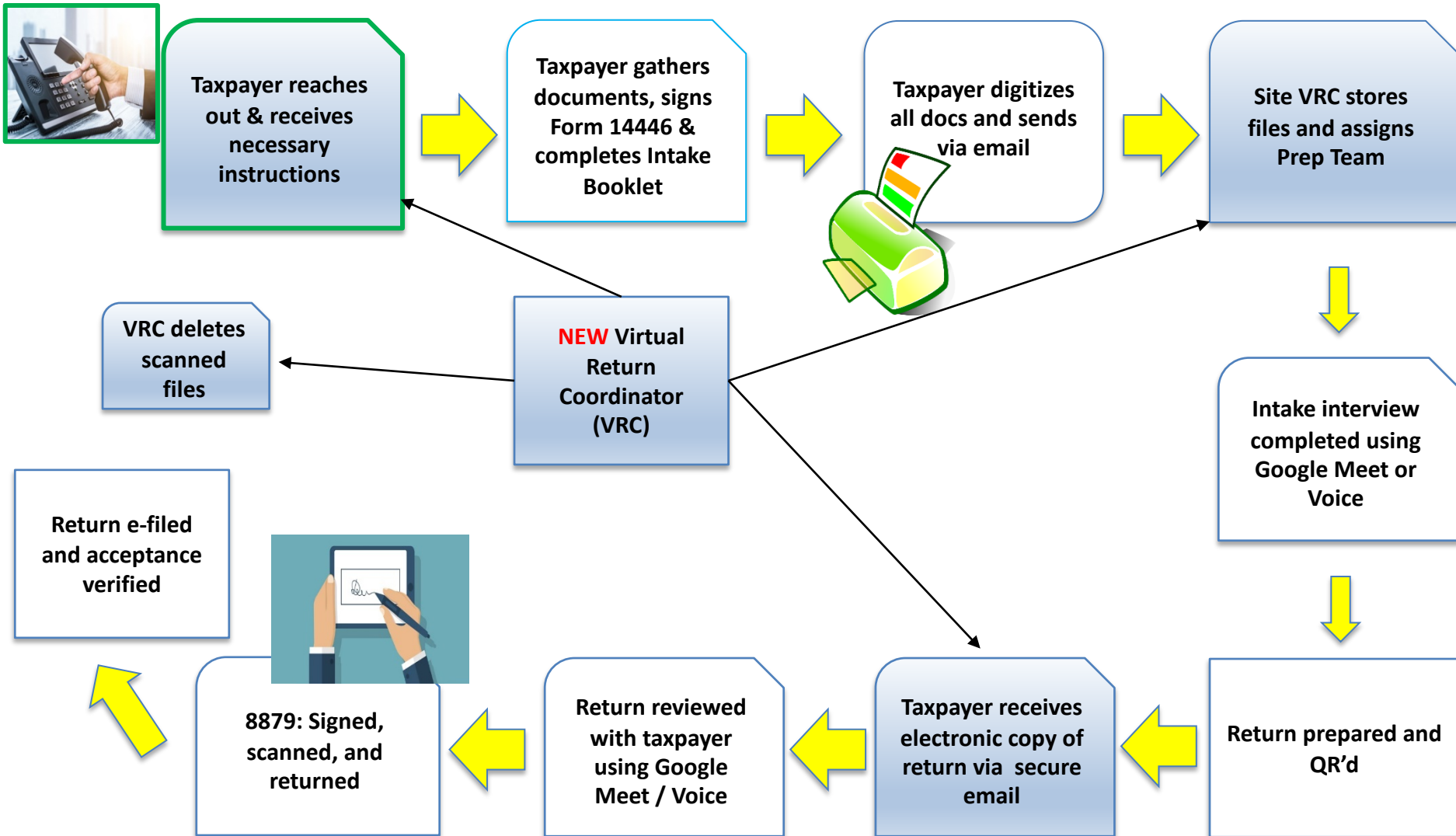
Scan Model



Virtual Low Contact Model



Contact-Free Model



■ VRC Role – District & Site

■ VRC is a **NEW** Position – District & Site

District VRC receives taxpayer request

Interviews Taxpayer > send to Site VRC

Site VRC is Critical to ensure positive experience

VRC educates the taxpayer to the process

VRC must understand taxpayer needs

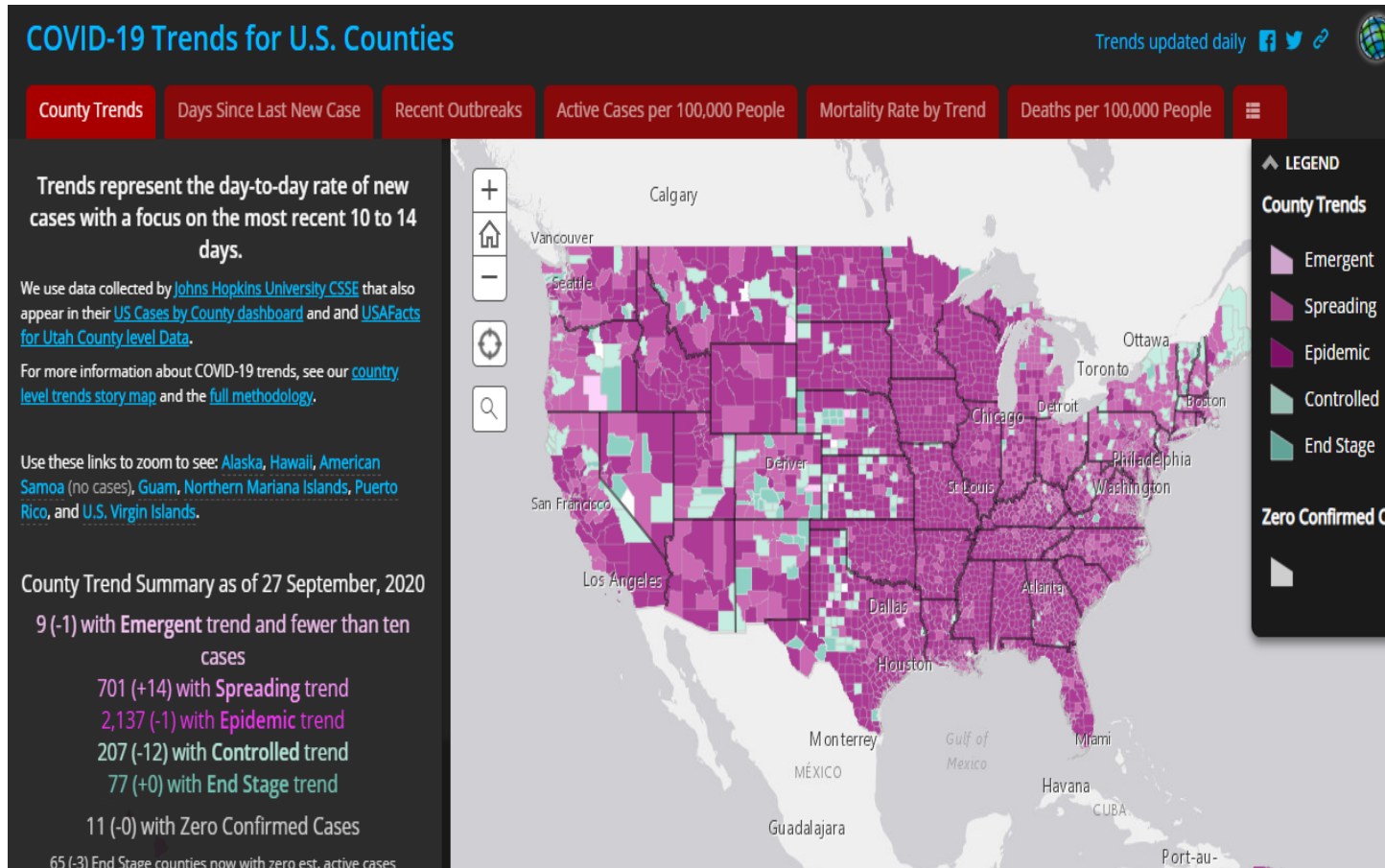
VRC controls scanned taxpayer documents

VRC uses encrypted e-mail to communicate

VRC is responsible to delete scanned documents

COVID Status

National will use COVID-19 County Trends map



Step 1: COVID Matrix Table

Model	In-Person Taxpayer Contact?	Approved?	Models Available in Each COVID Stage				
			End Stage	Controlled	Emergent	Spreading	Epidemic
Contact-Free/ Contactless	None	Yes	Yes	Yes	Yes	Yes	Yes
Low Contact	1-2 Sessions < 15 mins	Yes	Yes	Yes	Yes	Yes	Yes
Traditional Scan	2 Sessions >15 mins	Yes	Yes	Yes	Yes	Yes	Yes
Modified In-Person	Yes, but time varies by process	Yes	Yes	Yes	Yes	Yes	No
Traditional In-Person	Yes	Yes	Yes	Yes	No	No	No
In-Person Training	N/A	Pending	Yes	Yes	No	No	No
Drop Off		On Hold	Pending Review of IRS & AARP Guidance				

For sites that have any in-person activity (Low Contact , Traditional Scan, Modified In-Person, and Traditional In-Person models): **all** Tax-Aide safety measures must be in place for every stage, and all local and site guidance must be followed. Sites operations are dependent on local guidance.

Note: Not shown are the two taxpayer self-preparation methods: virtual coaching of taxpayers (ATP) and provision of selected free online tax prep software.

AARP Foundation Tax-Aide Service Reopening Process

There is a 3-step process to help volunteer leaders determine which service delivery models can be used.

- All 3 steps are approved, with implementation details being provided in the coming weeks for Steps 2 & 3.
- Sites will not be required to submit a COVID site opening plan.
- **Step 1: Alignment of the Service Delivery model to the COVID Table:**
 - DC will use the COVID Matrix Table to determine which service models can be implemented in their area.
 - The COVID stage in the area is based on the [Johns Hopkins/ESRI model](#) (End Stage, Controlled, Emergent, Spreading, or Epidemic); each DC will consult the relevant column on the COVID Table for their area to identify available options for their sites.
 - COVID stage assessment should be done in the current moment, along with contingency plans for how things may change by the time the tax season begins (and during the season, DC's will need to monitor changes to their areas' COVID stages).
- **Step 2: Local Guidance:** Opening/closing of sites must also follow local (and site) guidance – if it is more restrictive than the COVID Table, LC's must follow the local (and site) guidance when considering which models to implement.
 - Actions taken, such as updates to site status, are data-driven and based on local (and site) guidance.
 - Local (and site) guidance will be reviewed weekly to keep tabs on changes to that guidance and what it allows.
- **Step 3: Exceptions:** To address local nuances, an exception process will be provided so a District or Site can appeal determinations from Steps 1 & 2 if there is a viable reason to overrule them (examples of potential exceptions will be provided soon).
- The current plan is for the TA National office to own the local/site guidance review in Step 2 and appeals review in Step 3, and it will also be conducting monitoring through the season – if this ownership changes it will be communicated with instructions.
- Sites that have any in-person activity must employ all TA safety measures, as established in the last season, and additionally now include sneeze guards (PPE will be in the Ordering System).

■ TA Safety Measures – all In Person plans

- AARP Foundation Approval – see Matrix
- State, Local and Host Site Requirements met
- Adequate Volunteers willing to staff in person tax site
- Taxpayer Compliance - Posted Requirements
- Virus Mitigation Plan
 - Adequate PPE supplies on hand– order from portal
 - Face covering – face shields are now approved
 - Social distance in all areas of tax site – includes workstations
 - Temperature checks before entering tax site
 - Sanitize surfaces before opening and between taxpayers
 - Volunteers wash hands between taxpayers and document handling

Any
Questions?