AARP FOUNDATION TAX-AIDE

14446 Instructions

There are four templates for Form 14446, one for each model (Traditional Scan, Contact Free, Low Contact with One Taxpayer Visit, and Low Contact with Two Taxpayer Visits). Use the form that is appropriate for the model used to prepare each Taxpayer's return.

Before using each template the first time, fill in the site-specific information at the top of page 1 (site name, site address, name of site contact, and site contact telephone number). All fields requesting site-specific information are required. The SIDN should be that of the intake site or that belonging to the site for the software license on which the return will be prepared. Enter first name and last initial of the Local Coordinator and the site contact. Enter either a site contact phone number, the site's appointment line number (i.e. the Google Voice number), or the Site VRC's email address in the Site Contact Telephone Number field. Volunteers should not enter their full names or their personal phone number/ email address.

To open a template and insert the specific information on page 1, navigate to the file, **right** click on the file name and select **Open With Adobe Acrobat.** You will be prompted to sign in, select **Sign in with Google**. Click the button next to your VolID@aarpfoundation.org ID and WAIT. It will take a moment for the document to open. If it does not open after a few moments, click the Adobe Acrobat icon on the tray at the bottom of the screen, you should see the document. Once you enter the site-specific information, you will need to save the revised document (see page two of this document).

Page 2 of the form describes how the return will be prepared, including intake, quality review, review of the return with the taxpayer, e-filing the return, and deletion of scanned files. The text on this page is fixed and not editable. This language has been sanctioned by Office of General Counsel and cannot be changed. **Volunteers must use the 14446 template documents that are provided.**

Taxpayer must complete the information at the bottom of page 3 and sign the form. If taxpayer is married filing joint, taxpayer and spouse must sign this form.

The entire signed Form 14446 must be scanned with taxpayer's other information. The original signed Form 14446 is returned to the taxpayer.

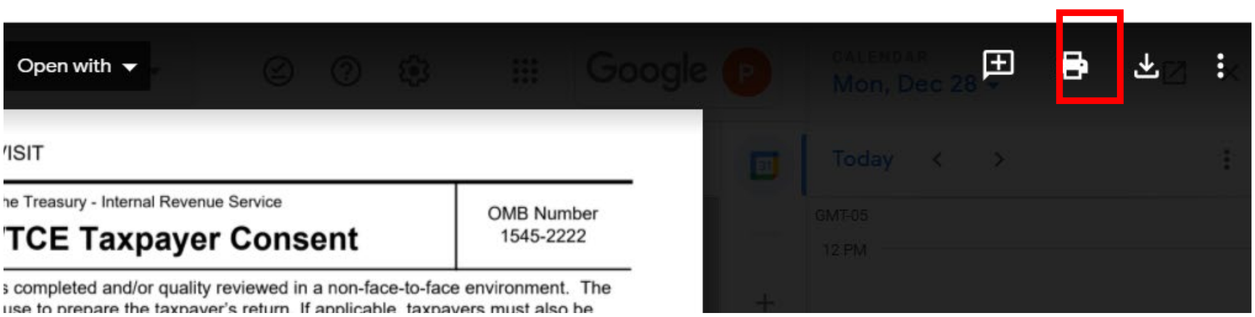
We do NOT retain any part of the signed Form 14446 after the taxpayer's scanned files are deleted.

The Forms 14446 templates are PDF form fillable documents. There is a separate form for each of the virtual models: Traditional Scan, Contact Free, Low Contact with 1 visit, and Low Contact with 2 visits.

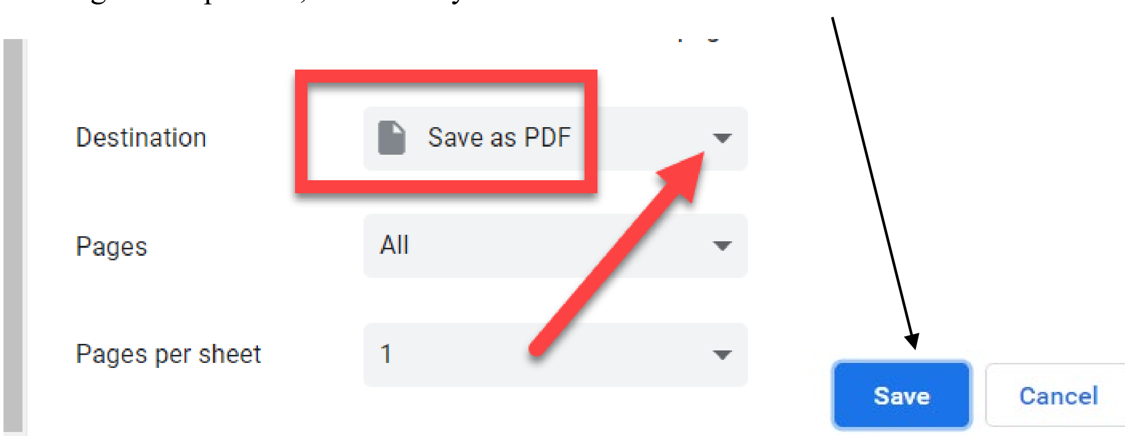
Whether you are emailing the form to taxpayers in the Contact Free and Low Contact models or handing the form to taxpayers in the Traditional Scan, you must first complete the site-specific information needed on page 1 (see page one of these instructions). The only taxpayer specific information on the 14446 is completed by the taxpayer (and spouse) when signing the form on page 3.

Once you complete a Form 14446 for your site, save it for continued use during the season. To save the form, with your site-specific information:

- Locate and open the template you need – using the Chromebook native PDF view
- Fill in the site-specific information on page 1 of the 14446
- Select the **printer** icon in upper right corner of the window



- In the print dialog box, make sure that the "printer" is set to **Save as PDF**, select that option by clicking the drop down, if necessary. Click **Save**



- Navigate to the location on the Google Drive where you want to save the document
- Enter the new document name in the “file name” area at the bottom of the window.