

Accounting Aid Society
Site Coordinator Update – February 25, 2023

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Best Practices

INTAKE & INTERVIEW

Please review with all staff and volunteers the importance of a thorough intake and interview with the client. This includes asking follow-up questions to some of the information on the federal Intake/Interview sheet such as confirming the answers about tax-related identity theft on page 1 and some of the questions on page 2. Ask the client if they are missing any W-2s or 1099-Rs, or did they work and not receive a W-2 or 1099-NEC. Follow up on other questions on the intake sheet as warranted given the client's situation. The Quality Review should also involve follow-up questions.

Prior Year Returns and Statute of Limitations for Claiming a Tax Refund

If a client needs a prior year tax return prepared, they should be advised to call the Main Office after April 18 to make an appointment during our summer season, with the following two exceptions:

1. They have received a notice or letter from the IRS.
 - Clients should be referred to Accounting Aid's Low Income Taxpayer Clinic (LITC). They should complete and submit the online LITC Client Application Form at <https://accountingaidsociety.org/low-income-taxpayer-clinic/litc-client-application-form/> to request a consultation. They may also contact the clinic at litc@accountingaidsociety.org or 313-556-1920, ext. 1219.
 - More information on how the LITC can assist taxpayers can be found on Accounting Aid's web site under the Get Help tab, <https://accountingaidsociety.org/low-income-taxpayer-clinic/>.
2. The return falls under a filing statute of limitation.
 - If the client needs to file one of the prior year returns listed below, contact your assigned VITA Program Manager who will ensure that an appointment is made before the filing deadline. Please advise the client to be sure they have all of the information needed for filing the prior year return.

Statute of Limitations – Taxpayers must file by the dates below in order to claim a refund:

- 2019 federal tax return – July 15, 2023
- 2018 Michigan tax return – April 15, 2023
- 2018 Michigan Homestead Property Tax Credit Claim – April 15, 2023
- 2018 Detroit tax return – April 15, 2023
- 2018 Other city tax return – April 30, 2023

Site Administration

VOLUNTEER HOURS

Please ensure that all volunteer hours are being logged for each shift at your site. A reminder that this can be done in various ways:

- Set up a “Sign-in console/kiosk” in CERVIS (recommended method). Step-by-step process with screenshots can be found [here](#).
- Print a [Volunteer Sign-In Sheet](#) and have volunteers sign in and out. Enter their information/hours in CERVIS at the end of the day or send the sign-in sheet to Kelly Leper at volunteer@accountingaidsociety.org.
- Volunteers sign themselves in and out using mobile sign-in on their devices.

The Step-by-step process and the Volunteer Sign-In Sheet are also located on our Resources page in the Site Manual at <https://www.accountingaidresources.org/site-manual>.