

AARP FOUNDATION TAX-AIDE ELECTRONIC RETURN ORIGINATOR (ERO) POSITION DESCRIPTION

Purpose of Position	<p>The Electronic Return Originator (ERO) at a Tax-Aide site ensures that all federal and state tax returns are accounted for according to a written process required by Tax-Aide policy.</p> <p>The ERO may or may not be the designated volunteer who e-files returns for the site, depending on the workflow and needs of the site. That portion of the position is determined by the LC.</p>
Prerequisite Requirements of Position	<p>The ERO is trained to ensure all tax returns (federal and state) are accepted when e-filed, and rejects are processed promptly. The ERO must have working knowledge of Chromebooks, tax software, and interpreting IRS reject codes.</p> <p>The ERO must be certified at the Advanced level.</p>
Responsibilities of Position	<p>Writes, assists to write, or implements an already written process to ensure all federal and state tax returns are tracked from the moment a taxpayer enters the Tax-Aide site until the return has been e-filed successfully to IRS/State or alternate action has been taken when necessary for returns that cannot be immediately or ever e-filed. Ensures that all tracking documents are retained physically or electronically until the end of the calendar year.</p> <p>Ensures that all completed federal and state tax returns (i.e., prepared, quality reviewed, and signed by the taxpayers) are e-filed within three business days.</p> <p>Ensures completed returns that cannot be e-filed due to IRS specifications are marked to be paper filed and the taxpayer is provided adequate instructions on how to do so themselves</p> <p>Ensures returns that cannot be e-filed due to rejections are resolved by working with site volunteers and the taxpayer as soon as possible to resolve such rejections and to notify taxpayers within 24 hours if those rejects cannot be resolved.</p> <p>Ensures that unresolvable rejected returns or returns left and not completed (on hold) are deactivated on a schedule defined in the written process document.</p>

Responsibilities of Position (continued)	<p>Ensures that notes are made in the taxpayer record in the software for tracking progress resolving problem returns.</p> <p>Utilizes available reports in the tax software to track unaccepted, rejected, or not completed federal and state returns on a frequency and timing defined in the written process for the site.</p> <p>Assists counselors and/or LC/SCO to resolve rejects due to tax law or documentation errors, including follow up with taxpayers as needed.</p> <p>At end of the tax season, confirms that 100% federal and state tax returns that can be e-filed have been accepted; if cannot be efiled, then converted to paper returns or deactivated for all years of taxes prepared at that site. Verifies that NOTES have been provided in the tax software for all returns that are not e-filed.</p>
Terms of Service and Eligibility	ERO appointed for one-year term and, upon satisfactory annual review and continued Counselor certification, may be re-appointed for subsequent one-year terms. ERO is eligible for other AARP or AARP Foundation volunteer positions.
Time, Training, and Travel	ERO is most active during tax preparation season (normally late January through mid-April). Required ERO training will be provided annually by NTSC. ERO may be required to travel to several tax sites.
Appointment and Supervision, and Scope of Authority	LC appoints the ERO with the concurrence of the DC. The ERO reports directly to the LC. ERO assists the LC/SCO in all matters concerning the electronic filing of federal and state returns at assigned sites.
Working Relations and Progress Review	ERO is expected to work closely with LC, any SCO, Counselors, TC (or State TCS if there is no TC), and tax software supplier on all matters related to e-filing, paper-filing, or other resolution of federal and state tax returns at the site. ERO performance is monitored by the LC.
Date: December 2024	