

AARP Foundation Tax-Aide: Program Status & FAQ

AARP Foundation and our community partners are assessing coronavirus (COVID-19) developments on a daily basis to ensure that all CDC guidelines for health and safety are being followed to protect volunteers, staff and the people we serve.

For that reason, AARP Foundation Tax-Aide in-person services are suspended until further notice. While Tax-Aide provides free tax preparation and filing services to all taxpayers, many of its clients are over 65, a group considered by health experts to be at higher risk of developing complications from the illness.

Tax-Aide is now providing free online tax services and limited in-person assistance. We will continue to assess for changes in site status based on health data trends for the remainder of the tax season, which has been extended to July 15.

Frequently Asked Questions

Are there alternative services available?

- Yes, Tax-Aide is now offering several alternative service options.
 - A **self-prep option**, providing taxpayers with free access to software so you can prepare taxes on your own, is available at signup.aarpfoundation.org/preparing-your-taxes-online/.
 - If you would like **help completing your own taxes**, you can request the assistance of a volunteer to coach you through the process via phone or computer screen-sharing. Visit aarp.org/forms/tax-prep-assistance-request.html to submit a request.
 - A **modified in-person service** at a limited number of Tax-Aide sites is now available, by appointment only and with protective measures in place.
 - The service is based on the traditional Tax-Aide preparation model, with modifications to make it safe for volunteers and taxpayers.
 - Availability of this service will roll out over several weeks and is dependent on area health data trends, site host restrictions, and the number of volunteers who are able to staff the site.
 - A **virtual service with some in-person assistance** will allow you to receive and fill out the Tax-Aide intake booklet and have a volunteer prepare your return.
 - After filling out the intake booklet, you'll participate in an interview with a tax preparation counselor (either in person, by phone or by video), drop off the booklet, and agree to have all of your tax-related documents scanned.

- Once the tax return is completed and reviewed by Tax-Aide volunteers, you'll have several in-person and virtual options for finalizing and transmitting your return to the IRS.
- Visit aarpfoundation.org/taxaide for information and updates about alternative service options.

Why is in-person service available at some Tax-Aide sites re-opening and not others? How are sites selected to re-open?

- Many Tax-Aide clients and volunteers are over 65, a group considered by health experts to be at higher risk of developing complications from COVID-19. Given this vulnerability, we are basing these decisions on the latest health data trends in U.S. states and counties.
 - We will re-open services *only* in locations where health data shows a downward trend in coronavirus infection rates.

Will more Tax Aide sites re-open?

- The health and safety of our volunteers and taxpayers remains our top priority. Any decisions about re-opening will be contingent on the latest health data trends in U.S. states and counties.
 - Any type of in-person tax service option will also be subject to a thorough review and an approval process that takes into account AARP and AARP Foundation protocols. There is no expectation that we will fully re-open nationwide before the end of this tax season.

If Tax-Aide sites don't re-open in my area, what do I do?

- We encourage you to take advantage of Tax-Aide's virtual service options.
 - A **self-prep option**, providing taxpayers with free access to software so you can prepare taxes on your own, is available at signup.aarpfoundation.org/preparing-your-taxes-online/.
 - If you would like **help completing your own taxes**, you can request the assistance of a volunteer to coach you through the process via phone or computer screen-sharing. Visit aarp.org/forms/tax-prep-assistance-request.html to submit a request.
- Check irs.gov/individuals/find-a-location-for-free-tax-prep to see whether an IRS Volunteer Income Tax Assistance (VITA) site is open near you. VITA offers free tax help for qualified taxpayers.

Is there an extension for filing taxes?

- Yes. The government [announced](#) an extension in the filing deadline for federal tax returns to July 15. The deadline for payment has also been extended to July 15.
 - This relief applies to federal income tax payments (including estimated tax payments) normally due on April 15, 2020. Taxpayers do not need to file any additional forms or call the IRS to qualify for this automatic federal tax filing and payment relief.
 - NOTE: State filing and payment deadlines vary and are not always the same as the federal filing deadline. Some states automatically accept a federal Form 4868 extension, while other states have extended their tax filing dates. Check with your state tax agency for more information. Contact information for states is available [here](#).
- The IRS continues to process tax returns. Visit irs.gov/coronavirus for more information.
- Individual taxpayers who need additional time to file *beyond the July 15 deadline* can request a filing extension by filing Form 4868 through their tax professional, tax software or the Free File link on IRS.gov.

Federal Tax Returns

[IRS Notice 2020-18](#) postpones the due date for filing federal income tax returns and making federal income tax payments to July 15, 2020. Following are the options to consider:

- Get a rough idea of your tax situation using the 2020 IRS [tax withholding estimator](#) or one of the many estimated tax calculators available online.
- If there is a refund due, file your taxes on your own or ask for help from a volunteer <https://signup.aarpfoundation.org/preparing-your-taxes-online/>. Alternatively, if you can, wait to see if Tax-Aide service resumes in your location. Updates on the resumption of Tax-Aide service will be posted on the [Tax-Aide Site Locator](#) web page and at aarpfoundation.org/taxaide.

State Tax Returns

State filing and payment deadlines vary and are not always the same as the federal filing deadline. Some states automatically accept a federal Form 4868 extension, while other states have extended their tax filing dates. Check with your state tax agency for more information. Contact information for states is available [here](#).

My return is partially completed. What do I do?

- In some areas of the country, volunteers have reached out to taxpayers about options to complete their returns and will continue to do so as they are able.
- File your taxes on your own using one of the free software packages found at signup.aarpfoundation.org/preparing-your-taxes-online/.
- Tax-Aide's modified in-person service or virtual service with some in-person assistance may be available in your area. Visit the [Tax-Aide Site Locator](#) tool to see whether a site is open near you.
- Tax-Aide will complete the return once the site suspension is lifted, though there may be only a few locations where this occurs.
- You have the option to seek tax assistance from another provider outside of Tax-Aide. If you choose to do so, please notify Tax-Aide so that we are aware we no longer need to hold the incomplete return in our tax software. You can send notification to taxaide@aarp.org (be sure to include your city, state, site name and contact information).

How do I find out if I qualify for an Economic Impact Payment ("stimulus check") or the status of my payment?

- Visit irs.gov/coronavirus for eligibility and other information, and visit irs.gov/getmypayment to find out your payment status.

I can't afford to pay someone to do my taxes. What options do I have?

- File your taxes on your own using one of the free software packages found at signup.aarpfoundation.org/preparing-your-taxes-online/.
- Request the assistance of a volunteer to coach you through the process via phone or computer screen-sharing. Visit aarp.org/forms/tax-prep-assistance-request.html to submit a request.
- Check irs.gov/individuals/find-a-location-for-free-tax-prep to see whether an IRS Volunteer Income Tax Assistance (VITA) site is open near you. VITA offers free tax help for qualified taxpayers.

I have to file a 1040 in order to keep receiving my pension.

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I have to file a 1040ME to get the state property tax credit.

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