

Required materials at each tax site:

All materials available in [Orders Tab](#) on AARP Volunteer Portal

1. Current edition of the **AARP Foundation Tax-Aide Poster (D143)**
 - This poster must be prominently displayed at the site at the first point contact with taxpayer.
 - AARP Foundation Tax-Aide Poster (D143) supersedes IRS VITA Pubs 4836 and 4053.
 - Cross out/white out "edi" in civil rights division email address.
2. **AARP Foundation Tax-Aide Intake Booklet (13614-C)**

The current Intake Booklet must be used for current year returns. When preparing prior-year returns, the appropriate prior-year intake booklet must be used.
3. **AARP Foundation Tax-Aide Tax Record Envelopes (D12225** for English version, D174464 for Spanish version).
4. **Taxpayer Information and Responsibilities document (D20232)** must be available at the site for review by taxpayers.
5. **Tax-Aide ID badges**. All volunteers present at the site must wear Tax-Aide ID badge showing their first name and first letter of their last name.
6. **Tax-Aide Out of Scope Poster (C2467)** for the current year.
7. **Site Activity Log (D19597) or site-specific log**

Required resources and information - paper or electronic version

1. NTTC's version of the IRS Publication 4012 - Volunteer Resource Guide updated with all IRS changes
2. IRS Publication 17 - Your Federal Income Tax for Individuals
3. All current Tax-Aide Cyber Tax messages (IRS Volunteer Tax Alerts or Quality Site Requirement)
4. All appropriate state (Oregon Publication 17) and local tax instructions
5. Emergency Response plan and checklist
6. IRS Publication 4299 Privacy, Confidentiality, and Civil Rights - Public Trust
7. Volunteer Agreements for all counselors and greeters/client facilitators