

State Tax Assistance Program (STAP)

If a Counselor has insufficient training on preparation of another state return, STAP can help. It provides access to an Assisting Counselor from another state trained on that specific state income tax law. Not all states participate. In 2017 Oregon was the only Idaho border state who participated. Assistance is not instantaneous and a second visit is likely for the taxpayer. The STAP process could take a week.

Note: Tax Commissions for all states (which provides state income tax law for every state with a state income tax can be accessed by Clicking on that Subject in the **Additional Links** section of this TaxAide Idaho web site.

The Requesting Counselor initiates the STAP process. After preparing the federal return and starting the Other state tax return a request for help from the other state is initiated by sending an E-Mail to XX@st-tax-assistance.org where XX is replaced with the two letter designation for that state. (Example: Replace XX with OR for Oregon) The requesting counselor and "other state" assisting counselor then communicates by E-Mail, telephone or other media. The requesting counselor is the only one who access to taxpayer documents and then only when the taxpayer is present. No copies of source tax documents are to be transmitted electronically.

The assisting counselor may log into the Requesting TaxSlayer site to review/update the state tax return if necessary. The Requesting and Assisting Counselors will dialog to determine if access to the requestor site is necessary. If access to the local TaxSlayer is to be granted to the Assisting Counselor, the requesting counselor works with the Site TaxSlayer Administrator to establish a username for the Assisting Counselor so he or she can view the state tax return. The Assisting Counselor's email address or cell number are needed for enabling this process. The Requesting Counselor and Site Administrator control the process. The Requesting Counselor establishes communication with the Assisting Counselor before the login username and password are passed. When Assisting Counselor first logs in, Assisting Counselor will receive either an email or a text message with the MFA code.

The local Site TaxSlayer Administrator can consider this format suggestion in establishing the username:

- Only activate the Username when needed.
- Suggest **xxxxSTAPVolyy** where **xxxx** is last four digits of SIDN. **yy** is state and **n** is the active request number, e.g., 1 or 2 or ... e.g., **1234STAPVolOR3** for an Oregon return.
- Deactivate the Username when STAP request is complete.

The requesting counselor is then responsible for completing and reviewing the return with the taxpayer and obtaining their signature for E-file.