

## AARP Foundation Tax-Aide CyberTax

**January 26, 2016**

**To:** All Volunteers of AARP Foundation Tax-Aide (with a valid email address in our system)  
**From:** Lynnette Lee-Villanueva, Vice President and National Director, AARP Foundation Tax-Aide  
**Subject:** CyberTax TY2015-03: The 2016 season is about to begin!

Dear Tax-Aide volunteers,

It's that wonderful, exciting, and maybe a little nerve-wracking time of year! It's the time to put your preparation and training into your community. It's time to prepare taxes. It's time to help people. Thanks for making this possible. As you make your final preparations for opening sites for tax year 2015, (You made yours last week? That's ok too.) I offer the following encouragement and reminders.

First and foremost, know that I, AARP Foundation, and your local and state leadership highly value quality. You were amazing last year and I trust you'll be as focused and incredible this year. Don't let the crowds weaken your resolve; recall your quality review training, ask probing questions spurred on by the Intake & Interview Sheet, and check in with your mentor, your Local Coordinator and your fellow volunteers if you have questions. We help people by completing accurate returns, not just preparing taxes. Remember our areas of focus and remember these two key pieces of quality:

1. 100% of all counselors will explain each return thoroughly to the taxpayer, and
2. 100% of all taxpayers will be reminded that the accuracy and completeness of the return is their responsibility

Make sure your site has the latest D143 Free Tax Help Poster (with the multi-colored stripes) up at the first point of contact with taxpayers. The IRS requires the civil rights language contained in the D143 to be posted and the larger size hopefully means your taxpayers can read that language. If your site discourages large posters, please be creative and attach them to the desk or table where you hand out intake sheets or even prepare taxes. This new version does not contain the white space to input site hours as the previous one did. A second, smaller poster with space to input site information is available on the OneSupport Help Center > General Program Management > Administrative called "Tax Site Hours Signage". It is also [viewable here](#).

TaxWise Online makes security easier for you to deal with, but it's important that we continue to keep security and confidentiality in mind. Don't keep any taxpayer data. That's one of our biggest risks. Please continue to keep private conversations private and only include those who have a need to know. Secure that equipment and those passwords. You are the key to security, so please don't take it lightly.

While looking out for security and taxpayers, don't forget to look out for each other. If you see a fellow volunteer struggling, offer to help. You can make this program great for another volunteer, every day. You can also make sure you know your site's emergency procedures. They should be coordinated with your host, but we've also updated our documentation to include violent situations. I pray you'll never need it, but you can review the emergency procedures and the update to cover violent situations [here](#) and on OneSupport > General Program Management > Incident/Emergency Procedure. Work closely with your LC and site hosts on emergency procedures.

I know you, like me, are focused on the coming season. You're ready to work well together, face the challenges of the season, and have fun, but I'd be remiss if I didn't talk a little about the future. As you are probably aware, this will be the last year of the IRS contract with TaxWise. We'll have new tax software next season. We are

coordinating closely with the IRS and are already building a transition team. TaxWise will be available into November, so amended returns will be possible. We're encouraged that IRS SPEC, our partner, is negotiating for carry forward data. No decisions have been reached, but please don't seek workarounds that have you keeping taxpayer data and putting the program at risk. Keeping taxpayer data is a violation of policy and unacceptable. We know carry forward data is important to productivity and accuracy; please let us work with the IRS to find the best solution for this to occur. There will be more on the transition to come, but know that plans are underway and consider taking the following steps as you go through this season. Please discuss this with your supervisor to see how best to incorporate this into your site's procedures.

Print the following documents for each taxpayer:

- Main Information Sheet
- Three-year Summary
- Taxpayer Diary if there are meaningful notes (can also copy to bottom section of MIS or Summary page before printing either of them)
- Screenshot of Form 1099-R Simplified Method worksheet if applicable
- Form 8606 if used and not in print package
- Sch D Wkt 2 - capital loss carryover if applicable and if not in print package (also note amount on Records envelope)
- Remind taxpayers to bring their records envelope with the complete 2015 Return with them next year.
- Remind taxpayers they must bring a social security card or other SSA documentation that shows the full SSN of everyone on the return (most tax documents now show only a truncated number). They should get a new social security card if they cannot find their original. This Social Security web site ([www.ssa.gov/ssnumber/](http://www.ssa.gov/ssnumber/)) has information on how to obtain a replacement card.

This information plus a suggested hand-out to taxpayers based on a version developed by Minnesota1 are on OneSupport > Tax Training> Tools and [available to view here](#).

Before this season ends, you will be invited to the new Volunteer Portal so you can submit reimbursement. This will be a new process, but we will work through it together. The mileage rate is now a maximum of 54 cents per mile. We can never thank you enough for all you do, but hope this little bit helps.

In that spirit of gratitude, I want to thank all of you for taking the time, making the effort, and working together to make AARP Foundation Tax-Aide great. Focus on quality and fun. Thanks for all you do.

Regards,

Lynnette Lee-Villanueva

Vice President and National Director

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