

AARP Foundation Tax-Aide CyberTax

April 21, 2016

To: All Volunteers for AARP Foundation Tax-Aide (with a valid email address in Volunteer Portal)

From: Lynnette Lee-Villanueva, National Director and Vice President, AARP Foundation Tax-Aide

Subject: CyberTax TY2015-07: End of Season Reminders: Data Security, Acknowledgements, Reimbursement

I must start with a resounding “THANK YOU!”. In my first season back with the program I am both reminded and awed by the amazing work each of you do in your communities for taxpayers and for the AARP Foundation Tax-Aide program. The program has filed over 1.64 million returns and it looks like we are again slightly up over last year. That’s good news and the great news comes from the IRS and Tax-Aide internal reviews. There will always be areas for improvement, like better utilizing that Intake, Interview and Quality Review sheet, but your emphasis and focus on quality shine through in those reviews and will once again surely be reflected in the satisfaction surveys we receive from the Tax Record Envelopes. It’s gratifying to lead such a powerful force of good.

Good does not come without change. That seems to be constant. We’ve certainly worked through some changes this year with the Portal. There have been bumps and bruises, but we’re surviving them and I thank you for your perseverance as AARP works to improve the administration portion of the volunteer experience across the organization. The Portal project is ongoing. We’ll see more change next season with the tax software and I know we’ll get through that too. Tax-Aide volunteers are resilient and I appreciate that along with the many other admirable characteristics that make this program great.

Thank you so much for all you do. AARP Foundation President Lisa Marsh Ryerson would also like to thank you. Please read her letter to you [HERE IN THIS LINK](#).

As you close out the season and celebrate all you’ve accomplished, we have a few very important reminders for you.

Program Metrics (Site Activity) and Q&As:

Local Coordinators, be sure you have input your program metrics in the Portal so all the service from your site is counted. If you need a reminder on the process, the training is available [HERE](#) or on the OneSupport Help Center (OSHC) > *Operational Procedures & Volunteer Portal* > *Training & Demos*.

Please be sure to report the number of tax answers you give to taxpayer questions to your supervisor for reporting, no matter where that conversation took place. You’re the tax expert to many people and if you’ve answered a question about taxes, we need that to include that information for our funders.

As you work through the following reminders, we ask that you please follow any additional instructions from your local volunteer supervisor.

Data Security and End of Season Reminders:

Process to ensure all e-filed returns have been submitted and accepted:

Be sure that you continue to use and/or double check your process to ensure that all e-filed returns have been submitted and accepted. It’s particularly important for balance due returns. Unfortunately, we have had situations where late penalties and interest has been incurred because we failed to transmit returns. Please help your taxpayers avoid this situation. For returns timely filed by April 18, 2016, please make sure all rejects are resolved as soon as possible, but no later than April 23, 2016.

End of Season procedures are listed in the IRS Pub 3189 in TaxWise Post-Filing Season sections. Here are a few highlights and items specific to AARP Foundation Tax-Aide.

Sites must secure the tax returns stored at CCH by following the instructions in the Pub 3189, TWO End of Season Instructions, and any other instructions published by the National Office. For off-season security, all users other than Admin should be made inactive. Alternatively, the user’s role can be changed to

Return Preparer, and all tax returns removed from these users' accounts. Consider keeping some users in a role that allows them access to returns that may require amending during the off-season. This will ensure that the minimum number of site/district individuals retain access to the returns to deal with taxpayer questions during the off-season. The DC/LC/ERO may also, if they prefer, inactive all users other than those selected for off-season access. See IRS Pub 3189 or the TaxWise User Guide if you need instruction for these procedures.

For IRS computers:

End-of-season details can be found in IRS publication 4473 "IRS Equipment Loan Program Welcome Package" at this [LINK](#) including:

*Return Depot computers by May 15 to:

Internal Revenue Service

Attn: Brookhaven VITA Depot

1040 Waverly Avenue, MS 800

Holtsville, NY 11742

A return label should have been included with your shipment, but publication 4473 can also help with:

*What to do if you are missing boxes or shipping labels *How to arrange for UPS pick-up using the toll free number: 1-800-833-9925. Use this number only! If you call any other number, you may be charged a \$10 pickup fee.

For other computers, including AARP-purchased and loaned or donated computers used to do taxes, please work with your local volunteer supervisor to make sure the unit is included in your state's inventory appropriately. AARP Foundation Tax-Aide purchased hot spots do not need to be included in your state's inventory; and should not be returned at the end of the season to the National Office or Verizon; it is to be stored for use for the next season.

Reimbursement:

Please submit all tax season assistance/counseling reimbursement requests to the National Office for processing by June 30th. Following your supervisor's instructions, we encourage you to use the PORTAL Reimbursement system. Training materials are available at this [LINK](#) for flat rate, this [LINK](#) for itemized expenses, and on *OSHC > Operational Procedures & Volunteer Portal > Reimbursement*.

Training reminders for next year:

Volunteers should retain their copies of the 2015 NTTC Workbook and Pub 4491 for next year. The NTTC expects to publish an updated workbook for 2016, but the 2015 version will provide practice problems once TaxSlayer becomes available. The IRS does not plan to publish a hard copy Pub 4491 for 2016, but replacement pages for the 2015 version should be available. As part of the rollout plan, the NTTC will begin introducing TaxSlayer to volunteers in Fall 2016.

Extended Service:

For those of you that help taxpayers after April 18, thank you for your service. E-filing will be possible with TWO until October 17, however, remember that program policies still apply and two certified volunteers are required to ensure quality review and encourage safety. TaxWise will be available until November 9 when the contract expires.

Thank you for your service in your community and for your contributions to AARP Foundation Tax-Aide!