

Date: March 24, 2014

To: All Volunteers for AARP Foundation Tax-Aide (with a valid email address in VMIS)
From: Marcy Gouge, Assistant National Director, AARP Foundation Tax-Aide
Subject: CyberTax TY2013-07: Volunteer Tax Alert- Education Credit and Quality Site Requirement Alert- Balance Due (Required at Site)

Attached are two Alerts from the IRS. This information should be discussed with volunteers, and available at the site (either in paper or electronic format) for future review.

Attachment #1:

Volunteer Tax Alert 2014-03, Education Credit

Explains how to correctly compute the education benefits for taxpayers using the amounts shown on the Form 1098-T.

Attachment #2:

Quality Site Requirements Alert 2014-01, Balance Due Returns:

Provides information on assisting taxpayers with balance due returns and how to Get Transcripts of their tax accounts.

Questions regarding either of these Alerts should be sent to Marcy Gouge at mgouge@aarp.org. These alerts are also available on the *ShareNet > Policies and Procedures > Required at Site*.

Please be advised we are aware that some of you may not be receiving CyberTax messages. While we are working on this problem; we ask that you regularly check the Volunteer ShareNet for CyberTax messages “*General Program Communications>CyberTax Messages*” and that volunteer leaders send, if necessary, CyberTax messages to volunteers who may not have received them. The solution to this problem may require an entirely different process or software for sending email with large a distribution list and we are pursuing all options.

Attachments:

VolunteerTaxAlert3TY13031714.pdf

QSRAAlert1TY13031714.pdf