

April 15, 2013

To: CyberTax volunteers (all volunteers with a valid email address in VMIS)
From: Bonnie Speedy, National Director and Vice President, AARP Foundation Tax-Aide
Subject: CyberTax 2013-014: Happy Tax Day! End of Season Reminders

Congratulations and thank you! You and 35,000 of your fellow volunteers have successfully completed the 46th tax season of this program. I'm always amazed when I think about how far we've come. In 1968, volunteers helped 100 taxpayers. AARP Foundation Tax-Aide continued to grow from there and in 1977 volunteers helped over half a million taxpayers. By 1982 it was over one million and as e-filing cleared 70% in 2006, volunteers helped over two million taxpayers that year. Wow! As we make the transition from e-filing to TaxWise Online, we continue to grow. Growth has its share of challenges, but you persevere and continue to help so many in your community.

In 2013, with official season closing today and service still being counted, we know we will once again help over two million taxpayers. We have to remind you about tying up some of the loose ends below, but we hope you'll take a moment to celebrate all that you've accomplished this season as an AARP Foundation Tax-Aide volunteer. Please accept my gratitude on behalf of the taxpayers you've helped in your community. For those that didn't remember to say thank you, I'll say it again and again- THANK YOU!

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. I'm sure you report those questions and answers that occur at the tax site, and we want to reflect all your service to our funders. I am also sure, as the respected "tax man" or "tax woman" in your family and community, you get tax questions all the time when you are away from the site and outside of the tax season. Report those too! Thank YOU for answering those questions, preparing so many tax returns and for your part in this successful season. I know success does not come without its challenges, but I appreciate how you and your volunteer leadership have tackled those challenges head on, always pushing the program to be better and to serve the taxpayers in your community well.

Here are a few more general reminders and resources as you close out the season, but we ask that you please follow instructions from your local volunteer supervisor.

End of Season

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.

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 15, 2013, please make sure all rejects are resolved as soon as possible, but no later than April 20, 2013.

Data Deletion should occur on IRS computers using the Wipe Disk program provided software and on all other computers using ClearTaxpayerData v6.6.2. It is available on the Volunteer ShareNet (<https://volunteers.aarp.org>) in the "Technology Hardware" section under "Security". Please use this new version of ClearTaxpayerData v6.6.2, it is the most up-to-date version available.

For TWO, do NOT delete any taxpayer data.

Deleting the taxpayer data from TaxWise Online will render all your returns "invisible" to the carry-forward routines for next season, and will require a cumbersome process to recover them. 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. Move the returns to ADMIN or the account of another user permitted to access them in the off season. This will allow the user to access the TWO Training website to practice during the off-season without accessing any taxpayer data. You may also want to keep a very limited number of supervisory users in a role that allows them access to returns that may require amending during the off-season. See Pub 3189 or the TaxWise User Guide if you need instruction for these procedures.

Data Retention: Taxpayer data can be retained for the following season. Data retention for TWO is automatic, and requires no action from volunteers. Data Retention for the Desktop software is permitted and the following procedures are required if you wish to retain your taxpayer information for next year. The retained data for a state must be maintained by one person in the state (designated by the State Coordinator and Technology Specialist). If you only retain a backup of returns created by the TaxWise program no further encryption is required, but if you retain the complete program file (i.e. the UTS12 folder), it must be stored on encrypted media. Per policy, only the current year data (in this case Tax Year 2012) can be retained. This data is primarily used to "carry forward" selected taxpayer information for preparing next year's returns, so previous years are not needed. It can also be used to amend a prior year return, but retaining more than one year's data presents too great of a security risk. See the "Securely Sending Taxpayer Data" document in the Security Section on Technology Hardware page of the Volunteer ShareNet for more details on this topic.

For IRS computers, additional end-of-season details can be found in IRS publication 4473 "IRS Equipment Loan Program Welcome Package" including:

*Return Depot computers by May 15 to:

Internal Revenue Service

Attn: VITA/TCE Depot

1040 Waverly Avenue, Stop 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, please work with your local volunteer supervisor to make sure data is deleted and the unit is included in your state's inventory appropriately.

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 FAST Reimbursement system for B, I, &T mileage expenses when no receipts are required for faster payment. Training materials are available on the Portal, <https://volunteers.aarp.org>, at Volunteer ShareNet > Portal Applications Support. Volunteer leaders, please submit your reimbursement requests for non-counseling expenses at least quarterly.

It might be helpful to retain your 2012 manuals and training materials if you have room to do so until materials are revised and/or printed by the IRS for the next tax season. Based on our experiences this past year, it is always helpful to have at least the prior year's materials available.

Thank you for all you do for taxpayers across the nation.