

January 30, 2014

To: AARP Foundation Tax-Aide Volunteers

From: Veronica Coates, National Technology Manager, AARP Foundation Tax-Aide

Subject: Cybertax TY2013-01: TaxWise support, 8453

With a new season nearly upon us, we wanted to get the following information out to you so you know where to go with support and answer your questions on what to do with 8453s. Please see below.

TaxWise phone and email: CCH TaxWise has informed us that they have completed the installation of a new system for phone and email. Some of the highlights of the new system are below and in the “Who Do I Contact” document that is attached.

With the new phone in place when a volunteer contacts TaxWise Customer Support at 1-800-411-6391, they will only have three choices:

1. Return status
 - a. Instead of the reject menu that was automated last year there is a detailed message on how to get this same information (and more) on the solution center tool
2. Reg Code
3. Everything else

CCH TaxWise feels this new process will reduce the menu options for volunteers and assist TaxWise is routing the calls and emails more efficiently.

This new system has a new CHAT feature. This CHAT feature will time out after 10mins of inactivity and CCH TaxWise has added the Reps names to the chats for identification.

Volunteers will have the ability to view the incidents and surveys on the Solution Center <https://support.taxwise.com>. The volunteer logs into the Solution Center and selects the **Support** tab then selects **Incidents/Surveys**. This allows them to see their incident ID number, Date, What the call was about, whether it was call or email and who entered the incident. The solution center incidents update overnight so the volunteers will have access to this information the following day.

Please Note: The biggest difference that the volunteers will see is that CCH TaxWise Customer Care Management has made the decision **to discontinue giving out incident numbers unless the caller requests one**. If you want the incident number at the time of the call, you will need to ask for it before the call ends.

Retention of Form 8453- Clarification, especially important to Local Coordinators and EROs. There's been some confusion about 8453s, so this message is also intended to clear that up.

The issue of retention of Form 8453 continues to be confusing because of various changes in past years. The IRS does require that copies of 8453 be retained through December 31.

However, the AARP Foundation Tax-Aide policy is that Sites or EROs will not keep any forms or documents with taxpayer identity and/or SSN number on the document. This includes W-2s, 1099s, and Form 8879.

Form 8453 if used for mailing supporting documents to the IRS is an exception of a form that can be retained, but only for no more than three business days after receipt of the Acknowledgment. Form 8453 should be mailed to the Internal Revenue Service; Receipt and Control Branch and a copy to your local SPEC office. Additional information on where to mail is located in the IRS Pub 3189 *Volunteer E-File Admin Guide*. If you do not have access to a copy one is located on the (volunteers.aarp.org) Volunteer ShareNet > *Technology Hardware* >

Training. Tax-Aide sites should not retain the 8453 beyond the three business days. This is the policy to be followed by Tax-Aide volunteers.

We have been in contact with IRS SPEC a notice is to go out to all local SPEC offices to be aware of this directive. Check with your local SPEC for postage-paid envelopes to mail the documents.

Please remember that appropriate steps to secure taxpayer data must be taken at all times.

Thank you!

Attachments:

Who do I contact.pdf