

February 7, 2014

To: AARP Foundation Tax-Aide Volunteers

From: Marcy Gouge, Assistants National Director, AARP Foundation Tax-Aide
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Subject: CyberTax TY2013-04: 8453 and Scanning

Please note the date in the subject field of all CyberTax and bulletin titles will now reflect the Tax Year (TY) of the current tax season that it pertains to.

Both TaxWise Desktop and TWO permit attaching some scanned documents with a return rather than submitting them by mail with Form 8453. The National Office would like to clarify its policy on scanning documents to submit with a return (Brokerage statements, POAs, Custodial docs) at a location other than the tax preparation site.

These documents can be scanned from another location such as the ERO's home. However, you should only be scanning a copy of the documents away from the tax site. The originals should be returned to the taxpayer; at no time should an AARP Foundation Tax-Aide Volunteer have the original of these documents in their possession away from the tax preparation site. The document copies must be shredded no later than 3 business days. This is the policy to be followed by Tax-Aide volunteers.

NOTE: When documents are scanned and attached to the return there is no longer a requirement to mail the Form 8453 with the documents to either the IRS in Austin or your local SPEC office.

Scanning procedures can be found in the document titled "Securely Storing and Sending Taxpayer Data Guide TY13" located on the ShareNet in Technology Hardware> Security.

If you have any questions regarding this policy please send to TaxAideTrain@aarp.org.

Thank you!