

April 18, 2014

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 TY2013-08: Data Security and End of Season Reminders

Congratulations and thank you! Once again you've helped millions of people in communities across the country complete and file their taxes. Each person you helped surely joins the IRS, AARP Foundation and me in saying "THANK YOU!"

Many of you enjoyed this season on TaxWise Online (TWO). Over 85 percent of our sites are now TWO. We'll be 100 percent TWO in no time. Your efforts keep us moving into the future!

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

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.

TaxWise Desktop Data Deletion: For TaxWise desktop users, Data Deletion should occur on IRS computers using the Wipe Disk program provided software and on all other computers using ClearTaxpayerData v7.0.2TY13. It will be available on the Volunteer ShareNet (<https://volunteers.aarp.org>) in the "Technology Hardware > Security". Please use this new version of ClearTaxpayerData, 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. Consider keeping some users in a role that allows them access to returns that may require amending during the off-season. See IRS Pub 3189 or the TaxWise User Guide if you need instruction for these procedures.

TaxWise Desktop 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 Technology Hardware >Security Section on 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: 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, please work with your local volunteer supervisor to make sure data is deleted and the unit is included in your state's inventory appropriately.

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, 2014, please make sure all rejects are resolved as soon as possible, but no later than April 20, 2014.

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.

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