

February 2, 2015

To: All Volunteers for AARP Foundation Tax-Aide (with a valid email address in VMIS)

From: Bonnie Speedy, Vice President and National Director, AARP Foundation Tax-Aide

Subject: CyberTax TY2014-06: New season, Volunteer Tax Alerts 04-07, OSHC

Welcome to the 48th season of AARP Foundation Tax-Aide! You've made it through training and now you get to do the best part of volunteering- serving taxpayers and serving your community. The Affordable Care Act (ACA) may bring Counselors new challenges this year, but I trust that you are ready as a result of the great training that your Tax-Aide Instructor provided, in addition to the many Resource Tools available on the OneSupport Help Center. AARP Foundation Tax-Aide volunteers always find a way to meet the challenges that each new season presents.

If you find yourself needing some help, don't be shy, ask your fellow volunteers for help. Work together, use the available resources like the OneSupport Help Center and the ACA Resource Tool (mailed to Counselors last October, but still available from Fulfillment, stock number D20052) and IRS publications. Use the flow charts, check the details in the pubs, and if necessary verify with other volunteers--then you will have confidence that you have the right answer!

We have two key accuracy goals for this season:

- 1) 100% of all counselors will explain each return thoroughly to the taxpayer, and
- 2) 100% of all taxpayers will be reminded that the accuracy and completeness of the return is their responsibility

Please do your part to meet these goals, as they will increase not only accuracy but taxpayer satisfaction with the service that they receive at Tax-Aide sites.

Thank you for taking the time to be great volunteers who care about quality and accuracy. According to taxpayer satisfaction surveys, 98% of the time your service will make taxpayers happy. You always amaze me with your dedication and your giving spirit. Keep it up!

Have a great season and have fun!

See below for more information on:

- Volunteer Tax Alert 04- 07. Don't forget that these Volunteer Tax Alerts are required to be available at the site either in paper or electronic format.
- OneSupport Help Center updates

Included with this CyberTax are two Volunteer Tax Alerts (VTA) from SPEC that were released late last week. A total of four VTA were released, but two of the forms are purposefully not included as they contain no new information for sites or volunteers. The VTA associated with this CyberTax can be found here: *OSHC > Communication > CyberTax TY2014-06: New season, Volunteer Tax Alerts 04-07, OSHC*

The following is a Summary of all four VTA, as well as information on what you need to know as a Counselor:

1. *VTA-2015-04 Education Credits - Treatment of Pell Grants & Scholarships*

Advises a change related to the handling of Pell Grants as it relates to the opportunity the taxpayer has to claim part of that grant as taxable income and then take an Education Credit for qualified education expenses they paid out of pocket.

Use this link to open the document in your browser: [VTA-2015-04 - Education Credits](#)

2. *VTA-2015-07 Affordable Care Act – Premium Tax Credit (PTC) & Special Circumstances (Form 8962 Parts 4 & 5)*

Use this link to open the document in your browser: [VTA-2015-07 - Affordable Care Act](#)

Advises that Pub 974, which contains instructions and training scenarios on handling Parts 4 and 5 of form 8962 will not be available until some undetermined date in February. As a result, IRS has determined that volunteers should not prepare returns impacted by these sections until the materials are available.

Tax-Aide has determined that returns with these two parts will remain Out of Scope the entire tax season because:

- 1) It is unknown when the materials will be available
- 2) There will be no opportunity to train all volunteers on the information contained within the publication when it does become available, and
- 3) These two parts of form 8962 are potentially applicable to only a small number of the “typical taxpayers” who come to a Tax-Aide site

Tax-Aide understands that there will be some volunteers who feel that they can review Pub 974 when it does become available, train themselves on the applicable law, and then prepare accurate returns which include these sections, however this decision is in line with general program protocol which does not add further in-scope tax issues to the program once the tax season begins. This helps to reduce volunteer stress, and ensures that quality training on all in-scope issues for all Counselors remains the highest standard in the program.

3. *VTA-2015-05 Publication 17 (NOT included or needed at sites)*

Reminds volunteers that there are limited printed copies of Pub 17 due to budget restraints, and advises that the pub will soon be available in e-book format from www.irs.gov

4. *VTA-2015-06 - Affordable Care Act – Individual Shared Responsibility Provision (NOT included or needed at sites)*

Provides a summary of information that all counselors should already have received as part of their training on ACA. Review only as a reminder of your training, and note the resources at the bottom of the form if you need more information.

Questions regarding this information should be addressed to the OneSupport Help Center.

OneSupport Help Center updates:

The OneSupport Help Center (OSHC), which is the replacement for ShareNet, is available for use. All program related documents such as training materials, forms, guides, etc. have been moved to OSHC. The OSHC is located in the Portal. For access to the Volunteer Portal, please go to <https://volunteers.aarp.org>. If you have issues logging in to the portal, please refer to the attachment on troubleshooting. OSHC is more intuitive, user-friendly and has significantly improved search capabilities for documents and document contents. Volunteers can also follow specific sections for notification of updates to that section.

We are also pleased to announce two OSHC add-ons:

- *My Activities* provides volunteers a view of all support requests, called tickets, with the ticket status and an option to update the ticket if necessary. All sections being followed can be tracked here as well. See the “*My Activities*” link below for details. The quick guide can also be found on OSHC in the following path: OneSupport Help Center > Portal and VMIS Support > General
- *Submit a Request* allows volunteers to send any program related inquiry for assistance via OSHC. These requests are automatically routed to the right group for faster response based on the category of the request. This form is intended to replace the email contact to taxaide@aarp.org, tax-aide-ops@aarp.org, taxaidetech@aarp.org and taxaidetrain@aarp.org. See the “*Submit a Request*” link below for details. The quick guide can also be found on in the OneSupport Help Center > Portal and VMIS Support > General.

To help you get started please review the following attached documents through these links or on OSHC:

- [OneSupport Help Center Quick Guide Rev 11/12/2014](#)
 - *OSHC > Communication > General*
- [Quick Guide to OneSupport Help Center Submit a Request 012115](#)
 - *OneSupport Help Center > Portal and VMIS Support > General*
- [Quick Guide to OneSupport Help Center My Activities 012115](#)
 - *OneSupport Help Center > Portal and VMIS Support > General*
- [Portal Login and Troubleshooting Guide 020115](#)
 - *OSHC > Portal and VMIS Support > General*

We are pleased to announce the OneSupport Help Center and the additional add-ons; however, please refer to the wealth of information that can be found on the OSHC. Now that information is easier to find, we hope you can find the answer there. Your volunteer leadership is also a great resource to answer your questions. However, if the answer cannot be found, please submit a request. We will work to assist you as quickly as possible.

Attachments:

None. Please use the links and One Support Help Center locations listed for the documents.