

**February 27, 2017**

**To:** All Volunteers of AARP Foundation Tax-Aide

**From:** Jackie Lynn Coleman, Assistant National Director, Training & Quality Assurance, AARP Foundation Tax-Aide

**Subject:** CyberTax TY2016-04: Claiming Education Benefits and Continuing Education Credits Process

### **Volunteer Tax Alert (VTA) 2017-01**

The IRS has issued Volunteer Tax Alert [VTA 2017-01](#) that covers claiming education benefits without a Form 1098-T. This VTA is distributed to all sites for review with all Counselors. Sites will be required to have this available either electronically or in paper.

### **Continuing Education Credit Process**

The process for requesting Continuing Education (CE) credits has changed and is available on [OneSupport Help Center >General Program Management > General](#). Completed and approved Volunteer Standards of Conduct Agreements (Form 13615) must be sent directly to a designated IRS SPEC representative **by April 30** rather than to the AARP Foundation Tax-Aide national office. The IRS SPEC contact list is also posted on OSHC.