

## **AARP Foundation Tax-Aide CyberTax**

**February 17, 2017**

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

**From:** Lynnette Lee-Villanueva, Vice President and National Director, AARP Foundation Tax-Aide

**Subject:** CyberTax TY2016-03: Welcome to our 49<sup>th</sup> season

A belated, welcome to our 49<sup>th</sup> season. The first week was a rocky one, and the second week hasn't quite been smooth, but I want to thank you for your ongoing perseverance.

We, the national team, are working closely with IRS and TaxSlayer to communicate our concerns. We have had several days of manageable system performance, and know there are some functional issues that still need attention. TaxSlayer is committed to making many of the fixes so that we can produce accurate tax returns. There will likely still be some issues, some that can be addressed with workarounds and others that will require considerable vigilance from all volunteers involved in the return. It is not ideal, but I have already seen you getting faster with practice.

I want to thank you for that extra flexibility and resilience you've already shown this year. You wouldn't be a volunteer if you didn't like a challenge, but software transitions and stress tests aren't for the faint of heart. Fortunately, this program attracts a lot of big hearts. So, thank you for all you've done to serve in your community.

As you continue this season, I hope you'll be able to tap into that well of resiliency again if you need it and I hope you'll remember a few important items.

*Quality over quantity:* Hold yourself and each other to the high standards that make Tax-Aide such a wonderful program. We are always striving for 100 % accuracy and paying close attention to the intake sheet, performing a thorough quality review on every return, and including the taxpayer in the entire process help us all get there or as close as we can get. I know it is hard to turn people away who need our help, but accurate returns are the best way to help the taxpayers we see. Please keep that in mind.

*Resources, Resources, Resources:* Your volunteer leadership and volunteers at all levels of the program have worked closely with the IRS and TaxSlayer to make resources available to you to help with quality and accuracy. Visit the OneSupport Help Center in the Portal ([volunteers.aarp.org](http://volunteers.aarp.org)) to find many of those resources and count one another as resources as well. Together, you working with your mentor, with the quality reviewer, with your Shift Coordinator or Local Coordinator and fellow Counselor and Client Facilitator to face any challenges your site may see will make this program even stronger.

*Reimbursement Reminder:* All reimbursements are to be submitted through the Portal. If you are providing tax assistance at a site, you will need a Counselor title for “I” expenses. Talk to your supervisor or visit the OneSupport Help Center for tip sheets in the Volunteer Portal Guide on submitting and approving reimbursements whether itemized or flat rate. Excel statements will no longer be processed.

*Recruitment:* I know it’s odd to be thinking about recruitment when the season is just starting, but it’s always a good time to be thinking about recruitment. Is the taxpayer across from you a candidate for the program? Does your neighbor do her own taxes? Could your friend help with the crowds at your site as a Client Facilitator? Recruitment can happen at any time and not just for Counselors, so think about those around you and remember our best source of recruits continues to be the people you know.

Thank you again for all you do. Do your best to enjoy this season, work together for quality, and tell your friends about AARP Foundation Tax-Aide.

Warm regards,

Lynnette