

AARP Foundation Tax-Aide CyberTax

January 29, 2019

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

From: Lynnette Lee-Villanueva, Vice President, AARP Foundation Tax-Aide

Subject: CyberTax TY2018-02: Updates to AARP Foundation Tax-Aide Intake Process

With the new tax season upon us, I wanted to take the opportunity to reach out to you. We have heard from many of you with questions and concerns about the consent forms and the Intake Booklet. We thank you for supporting - some of you for many years running - Tax-Aide and free tax preparation services. Tax-Aide is a successful program because of committed people like you.

Please know that we have been working with key stakeholders, including volunteer leaders, AARP Foundation leadership, IRS, and TaxSlayer. In that regard, we are happy to let you know of two very recent updates to the process:

- **Volunteers will be able to e-file all taxpayer returns, regardless of whether taxpayers consent, or not, to Consent Form #2.**
- **If a taxpayer does not consent to Forms #2 and #3, Tax-Aide will not have access to that taxpayer's tax return information for reporting or for providing information about additional programs and services.**

Note that as a result of these updates, Tax-Aide will soon revise guidance for taxpayers and volunteers that is currently on the Portal Libraries, and repost these shortly.

In the meantime, here's a brief summary:

Consent Forms:

Consents are important in many areas of our lives. We need to make sure that the taxpayers we serve are informed participants in how their information is being used, and that we honor whatever it is they want to do. We are not alone in the tax prep industry on this front, as other entities have been employing consents for a while now.

Specifically, as to the consents found in the Intake Booklet:

- *Consent Form #1 - Consent to Disclose Information to VITA/TCE Sites :*
This is the IRS's standard form to carry forward taxpayer information to other VITA/TCE sites for future tax seasons. In other words, next year if the taxpayer elects to go to a different VITA/TCE site, their information will

be available at the site after validating taxpayer identity and inputting their Social Security Number, which should ease the tax preparation process.

- *Consent Form #2 - Consent to Disclose/Use Information* : This consent is between the taxpayer and the software provider, allowing information to be shared with the program sponsor (AARP Foundation); it also allows Tax-Aide to manage consistent custom questions used by all sites, get answers to these questions, and obtain the information for taxpayers agreeing to Consent Form #3. As mentioned earlier, all returns can now be e-filed, regardless of consent.
- *Consent Form #3 - Consent to Share Information with AARP Foundation* : By signing the form, the taxpayer allows AARP Foundation-the charitable arm of AARP-to send them information about free programs and services (such as efforts that foster financial resilience, provide job training for the 50+, offer intergenerational volunteer opportunities and empower older adults to stay in their homes and communities). This data will not be shared with AARP or AARP Services, Inc. and taxpayers will not receive any membership marketing or paid offers by signing the form. The type of information we will have access to - if the taxpayer consents - is indicated in the form itself: name, address, email address, phone number, age, adjusted gross income, household size and income, and refund allocations.

As a reminder, it is the taxpayer's choice to sign any of the consent forms and to provide demographic information. If the taxpayer is not comfortable, they may elect not to consent as well as select "prefer not to answer" for any of the custom questions.

Access to and Safety of Information:

Many have asked about access to taxpayer information. Security of taxpayer data is of the utmost importance to AARP Foundation. Note that there are internal AARP Foundation staff protocols for security of taxpayer data (including being subject to background checks, organizational and IRS audits, and the VITA/TCE Partner Sponsor Agreement Form 13533 requiring confidentiality and protection of taxpayer information). Further, only a small number of Tax-Aide staff (2-3 individuals) will have access to customized reports from TaxSlayer; these individuals have also taken the IRS Standards of Conduct test.

In terms of how will we use the information, this data helps us to better understand the breakdown of the populations we are servicing to ensure that we are meeting the Foundation and Tax-Aide's mission of assisting the 50+ low-income population and to analyze any other potential programmatic needs that can better service these individuals. It also allows Tax-Aide to report vital information to our sponsors, including AARP Foundation. And as mentioned

above, this enables us to share other free program information to those who explicitly ask for it.

What's Next?

We will not be able to alter the Intake Booklet for this tax year; however, we are looking closely at impacts these changes have on the season in real-time and will use that information for planning of the 2020 tax season. The goal of AARP Foundation Tax-Aide is to deliver free, high-quality tax assistance. This has not changed. It is core to who we are and what we do.

For further questions, we ask that you please contact the appropriate volunteer leaders in your area. We are also available via the OneSupport ticketing system.

Thank you again for your support.

As part of the Tax-Aide program, information including the latest updates and program guidance is regularly sent via email to all volunteers. Please click [here](#) if you are not a volunteer in the Tax-Aide program and therefore should be deleted from receiving further emails.