

AARP Foundation Tax-Aide CyberTax

February 15, 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 TY2018-03: Season Open

Dear Volunteer,

Now that we are a few weeks into the tax season, I wanted to reach out again, and thank you for your hard work and for your patience.

As you saw in our prior [CyberTax TY2018-02](#) of just a few weeks ago, we have moved forward with changes to our intake process and in documentation used to collect intake information via a new booklet, with consent forms included. You are on the front line of implementing those changes, and we appreciate your efforts and feedback thus far. Through continuing talks with the IRS, and with TaxSlayer by extension, we have been able to make sure taxpayers would not be excluded from e-filing; and we will continue those conversations to better clarify the language found in Consent Form #2 for next season.

In the meantime, here are a few other items.

The National Office is aware that some sites have experienced software performance issues early in the season. We continue to discuss these with the IRS and TaxSlayer, and are doing our utmost to resolve any problems to lessen local impacts.

On another topic, Tax-Aide has been making efforts to let taxpayers know that they have an opportunity to save their refund, if they so choose, via questions in the Intake Booklet and tax software. We are also conducting pilots at approximately 40 sites where we are testing the use of taxpayer communications materials, such as posters and flyers, as a means to educate on the option of savings. The purpose is to help promote financial resilience, among those who need it most, and in order to be ready for unexpected expenses.

Further, we want to remind you of the Volunteer Protection Act. The federal Volunteer Protection Act (VPA) aims to promote volunteerism by limiting, and in many cases eliminating, a volunteer's risk of liability when acting for nonprofit organizations or government entities. As long as Tax-Aide volunteers stay within the scope of the program and your training, you will be covered by the VPA. If as a volunteer you ever have questions about the breadth of scope when preparing returns, please check with your site supervisor or volunteer leadership.

Thanks very much for your valuable work helping the American taxpayer, and for your endurance as we continue to evolve the program; we could not do it without you.

All the best.