NY3 **AARP Tax-Aide News** December 2009

A Message from Your State Coordinator

On November 9th, we kicked off the 2009 tax season with a 2-day District Coordinators' meeting in Albany. In addition to presentations but the SMT, we reviewed last year's accomplishments which showed we assisted 36,843 taxpayers in filing their returns. Our 94% Efile rate made our IRS partners very happy and put us among the best in the these changes. Most of them are a reregion. Even more important, however, were our customer satisfaction ratings from the AARP Tax-Aide survey that were above both the regional and national level. This is a direct result of your commitment to excellence in your volunteer service to the community. We can't say **Thank You** enough.

We are fortunate to have a seasoned group of 13 district coordinators whose mission is to maintain the health and vitality of our program. The feedback you provided us in the recent volunteer sur- Ed vey was found to be very helpful in keeping us focused on what is important to YOU and helping us make changes so that our program becomes even more valuable for our volunteers. In the past few months, we have received over 100 new volunteer applica-

tions! This response is a testimony of the value your volunteer service is providing to the communities we serve.

As in the past there are a significant number of changes to the 2009 tax law. Our IRS and NYS partners join us for the meeting and provided highlights of flection of the economic conditions we are experiencing in this country of ours. You will be getting the details of these changes along with other procedural changes at your local training sessions. Copies of the above mentioned surveys and the other meeting presentations can be found at our www.nytaxaide.org website.

Thank you for volunteering with us and have a great holiday.



Spotlight on Volunteers



Nominated by: Dorothy Ryan

Dave Aikens

District Coordinator
Rensselaer and Columbia Counties

I first met Dave six years ago when he was the Local Coordinator at the Troy Senior Center which is part of the Rensselaer County Aging Department. Although tax preparation was not his first call in life, he has embraced it since 1995 when he first volunteered with AARP Tax-Aide. In addition to being a District Coordinator, Dave is also one of the best AARP Tax-Aide instructors I know. He spends many hours studying the tax code so that he can provide his volunteers the best possible training. He realizes that it is critical to know what you are doing in order to train and mentor others.

Dave communicates well with all the site contacts, counselors and people we serve. He is a consummate tax preparer and diplomat. He has been called a gentleman and the backbone of the program in the Rensselaer area. AARP Tax-Aide received a Certificate of Commendation from Rensselaer County last year due in no small part to Dave's attention to detail and diplomacy.

In addition to his AARP Tax-Aide commitment, Dave also offers his support and time to the Rensselaer ARC, Rensselaer Trust, and the United Way of the Greater Capital Region CA\$H collation.

Dave is a good leader, mentor, and all around nice guy.

Congratulations Dave!

Have someone you think deserves to be recognized? Send your nominations to: Colleen Mooney

Dutchess County - College Internship Program

By Colleen Mooney

Expanding on the success of the College Internship Program coordinated by Essex County volunteer Marica LaPierre, Dutchess County contacted the Career Services Coordinators at their local colleges and applied for both Marketing and Tax Counselors Internships. Students do earn college credit for these internships which provides a great incentive.

Marketing internships for AARP Tax Aide do not follow the traditional format as we have no real office, no compensation for travel/expenses, no formal structure and no opportunity for office camaraderie. What we have been able to offer is one-on one mentoring and the ability for self-motivated students to work independently and bring their technical skills and enthusiasm to enhance new ideas and improve the awareness of our great program. Our first goal was to improve our communication to you, our volunteers. This newsletter would not have happened without the assistance of Camellia Ardalan, Marist College Intern. Next semester we will concentrate on improvements to our website and community awareness of our program.

Although the Tax Counselor internship program has some traits of a traditional internship, it is very specialized and requires a tremendous amount of commitment and independent study on the part of the students. Students are required to provide a minimum of 40 hours of volunteer tax preparation service during out tax season. As this is our first year offering the program, we are very pleased to have student representation from three of our local colleges - Marist, Vassar and Dutchess Community College. Students will be given oneon-one mentoring until they feel ready to handle clients on their own. College students' say they are all very excited and think it will be a valuable experience. To quote one student "classes are really different than the real world and I think this will be a practical experience and very useful." As we all know, interviewing a client and helping them with their taxes is a great experience; it really is the **REAL** WORLD!!

I encourage all of you to think about offering college internship opportunities in your community. It's a great experience and I guarantee you will learn something too!

Instructor Training

By Joe Ciccarino

The 2009 NY3 Instructor Training was held November 11th – 13th in Albany. This training is critical for both new and experienced instructors as it provides them with consistent training material and knowledge. Additionally, it ensures all our new and returning Tax Counselors receive the necessary training to provide our clients with 100% quality tax returns.

Attendance was tremendous with 50 instructors representing all 13 NY3 districts. We also included 3 instructors from NY1 as they are currently without a Training Specialist. Highlights of the 3-day session included presentations from both our IRS and NYS partners. Joanne Passineau , our IRS Relationship Manager, updated us on all the many federal tax changes for 2009 and, Mwisa Chisunka, our NYS representative, provided the 2009 NYS changes. Both presentation are available in the Training Guidance section on our website www.nytaxaide.org.

As this is my first year as NY3 TRS, I wanted to understand what tax topics instructors were most uncomfortable teaching and what tax theory new counselors found most difficult to understand.

Based on a small survey of lead instructors the topics below came up again and again:

- Head of Household filing status
- Qualifying child/relative definitions
- Earned Income Credit (EITC)

New York State credits that aren't straight carryovers from the federal return

Based on this, I included a review of these items in this year's training. My intent was to provide all the trainers with detailed and consistent material to address these topics in their individual districts. The less experienced instructors seemed to find these presentations useful while the more experienced instructors found less value.

I'm always interested in topics that you, our <u>volunteers</u>, want more training on or find especially confusing or difficult to understand. If you have suggestions for topics for next year's training, please send them to me at <u>jicicc@aol.com</u>.

Hope wishing you all a great Tax Season!!

Some Highlights of American Recovery & Reinvestment Act (ARRA) 2009

- Deductions available for non-itemizers on the new Schedule L
 - State, local and excise taxes paid on new vehicles
 - Real estate taxes for home owners
- Energy efficiency incentives are back for 2009
- Making work pay credit- new Schedule M
 - Up to \$400, \$800 MFJ
 - Reduced by \$250 if SSA, VA, RRB
- Up to \$2400 in unemployment benefits tax free in 2009
- First time home buyer credit improves and expands

- American Opportunity Tax Credit (Hope Education Credit expanded)
 - Increase to \$2500 per student
 - First four years post-secondary education
 - 40% of the credit is refundable



Learn more by attending the 2009 Training Sessions!

<u>Upcoming</u>

Events

Returning Volunteer Training

The 2009 AARP
Tax-Aide Season!!

AARP Tax-Aide

Websites

For the Public:

www.aarp.org/taxaide

For Volunteers:

www.aarp.org/tavolunteers

Have an idea for an article?

Please send your submissions to:

Colleen Mooney cmooneytax-aide@gmail.com

Published by NY3 Communications Team



Anxious About Switching to TWO??

By Ron Liberty - DC Albany County

Since becoming District Coordinator in 2006, I have had an opportunity to experience the various ways Counselors, LCs, and EROs deal (or is it wrestle) with the TaxWise software. I noted a certain consistency among the various sites: frustration in dealing with encryption and lengthy passwords; ERO burnout in uploading and downloading completed returns; batching and unbatching; getting the right returns "sent"; updating computers each time a new version was distributed.

At one site, counselors felt the computers that were owned by the site were not secure enough and taxpayer data was at risk. At another, counselors considered it an inconvenience to move the printer lead from computer to computer in order to print the returns. At a third site, counselors had so much difficulty carrying forward data from a previous year, they gave up trying and decided it was easier to just retype the information.

Hearing about TaxWise Online (TWO) at a DC meeting, I hoped it could help resolve many of these issues. But, before I embraced this "new" technology for the entire district, I felt trial run was in order. Two sites were selected for trial. One had two counselors and a QR person; the other had four counselors and a QR person. All but one counselor had TW desktop experience.

What a success!!

The most frequent comment from the counselors was: it's so easy to "send" a return. Both EROs were delighted that updates were a thing of the past. No more flash drives or backups or restores to deal with!

Was it all perfect?

No, nothing ever is especially when it comes to taxes. We did have one day when the Internet was very slow for about 10 minutes. **However, no one complained!** The taxpayers understood the reason and the counselors all agreed it was a tiny price to pay given all the benefits of TWO.

At our end-of-season "lessons learned" meeting, most counselors seemed eager to try TWO. So, this year we will be using TWO at our two largest sites in Albany County. Although additional training will be necessary for the changeover, counselors at these two sites are aware of our success with TWO and are looking forward to it. Only one concern was raised:

How do we deal with all the new wires? Won't that be a hazard?

Working with our site hosts, we found ways to rearrange our space and are making good use of Velcro straps to minimize any hazardous conditions.

My suggestion for those transitioning to TWO: identify one or two "techie" persons in your district who could be called upon if a glitch does occur. After all, computers can act "funny" sometimes. This person(s) doesn't have to be a counselor or even be at a site. I like to call them "computer facilitators." Ours works for an IT firm in town and has agreed to help us at a moments notice. Hopefully, we won't need to call him but better to be prepared!!

Embrace TWO and see what you can do to enhance the experience of your counselors, LCs, and EROs.