NY3
AARP Tax-Aide News
February 2013

A Message from Your State Coordinator - Ed Hogarty

Each tax season brings its own set of challenges and this year has been no different. The major challenges involved a 66% reduction for meeting expenses and delays in the availability of 2012 IRS training materials for the instructors and volunteers.

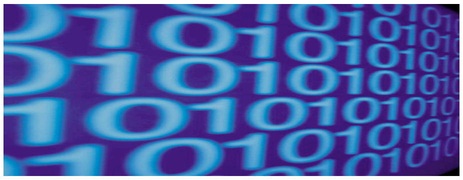
In spite of these challenges, your volunteers rose to the occasion. Not only did they meet the challenges, they exceeded all expectations!

I want to give a special thanks to Ron Liberty for securing a new venue for our State Management Meetings. The new venue received excellent ratings by all who attended and the reduced expenses enabled us to obtain additional computer equipment to help alleviate volunteer frustration and better support our program.

In spite of the delayed training materials, our instructors were able to train **124** new volunteers and certify **475** returning volunteers. Hats off to all the instructors and our TRS, Pete Freiermuth, for this accomplishment. Speaking of Pete, I would like to take this moment, to congratulate him on being chosen as the National Chair of AARP Tax-Aide Training. Pete has served as the TRS for NY3 over 5 years and was instrumental in forging a relationship with the NYS Department of Taxation. This relationship along with Pete's dedication to the program has resulted in a level of state training support for our volunteers that I would challenge any other state to match. We are proud to have Pete as an active volunteer of NY3 and wish him the best in his new position at the National Level.

In 2012, the Tax-Aide program in NY3 assisted 41,500 taxpayers and prepared over 26,000 tax returns. As a result of your efforts, taxpayers in our local communities received over $23.6 million in tax refunds, including $6.3 million in federal tax credits. Many thanks to you, the 650 volunteers working at the142 sites in NY3, for your dedication to serve your community.

Have a great 2013 tax season!!



Technology Corner
Howard Riggert

There are always a number of things required each year to get our equipment ready for the upcoming tax season. The Technology Coordinators got together in November to go over the new requirements and discuss issues and resolutions among themselves. Because the TC and DC meetings were held at the same time, there wasn't much opportunity for interaction between them. Next year, we'll plan to provide for lunch and snacks at the same time.

Our total donated funds for 2012 were $1,273 down $2,186 from 2011. While we can't solicit donations at our sites, we do need to make the public aware that donations can be made to National for the benefit of NY3. This is the only way we will be able to continue to purchase more equipment to accommodate our growth in sites, counselors and the number of tax returns completed.

The conversion of Windows XP machines to Windows 7 made significant progress during 2012. National provided memory upgrades to many computers to get the memory up to at least 1 GB of RAM so they could be upgraded to Windows 7.

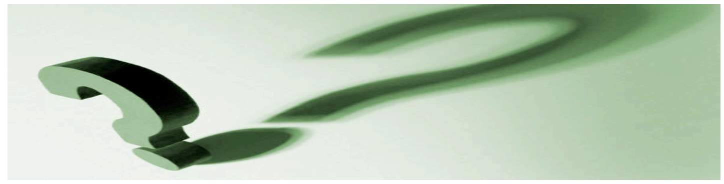
National provides Windows images to enable upgrading to Windows 7 and to reduce the time required to get the operating system up to date at the start of the season. For computers not used since the end of last tax season, there were more than 50 updates to Windows.

Last year's inventory process included using an Inventory Data Collection (IDC) tool to automatically record make, model, serial numbers, and license keys. A database was created so that when a computer is re-imaged, the database is automatically searched and license key is installed. However, National discovered that data has to be collected again as some duplicate serial numbers exist. A new IDC tool has been developed and will be used for this year's inventory.

Please remember, if AARP-purchased computers fail during tax season they are to be sent to National for repair or replacement. AARP purchased printers that fail are to be sent back to GraceWorkz for repair or replacement. Barbara Kaiser and Kaye Curry are the contacts for GraceWorkz for Consumables and for printer repairs/replacement.

If you have any Technology questions or suggestions, please contact your Technology Coordinator or send an email to me hmriggert@verizon.net

Training Corner
Pete Freiermuth



Tax Training has indeed been an adventure this year. We endured the lack of material, the need to train using old information and software, and a record number of volunteers. In spite of these difficulties, NY3 certified 505 preparers and 94 client facilitators!!

I want to thank all the instructors who persevered and found ways to get everyone trained, certified, and ready to prepare taxes for our clients who depend on us. I believe that most of our difficulties in preparation were transparent to the taxpayers we serve which is a great achievement.

A New York State competency test was introduced this year and many of you completed it. The mixed results point out some weaknesses in our training as well as some problems in the test itself. We will be reviewing the results and the test questions with our representatives from the NYS Taxation Department and anticipate next year's test will be much improved over this 'first edition'. I also anticipate that our New York State training will provide more emphasis on the special credits and retirement income exclusions.

As I look forward to next year, I am optimistic that we will have the proper training material on a timely basis and it will contain the correct information. One of the key concerns that I hear relates to the future of the IRS Pub 4012. This Pub will still be available in hard copy next year, and will likely go back to the spiral binding that we have had in the past. Other training material, however, may migrate to electronic copies only. This is really just a sign of the times and a reality of the need to reduce costs.

As Ed mentioned in his message, I have accepted the role of National Chair for AARP Tax-Aide Training, and, therefore, must resign as the NY3 Training Specialist.

In closing, I want to express my appreciation to all the instructors and the District Coordinators who have worked with me over the last several years. Their support has been invaluable, as we have worked together to significantly improve the NY3 training program and to complete the migration from completing returns on paper to using computers almost exclusively to prepare returns.

My thanks go out to all the volunteers who are helping to make this program the success that is, especially when you are able to overcome the challenges that were presented to you this year.

INTRODUCING YOUR NEW ADMINISTRATIVE SPECIALIST VIRGINIA (GINNI) GOGGINS

As many of you know, after serving for 7 years as the Administration Specialist (ADS), Dorothy Ryan resigned in 2010. However, since her replacement had to resign because of health issues, Dorothy willingly continued on throughout the 2011 season.

Fortunately, after the 2011 tax season was over, Virginia (Ginni) Goggins applied for the position and was overwhelmingly approved. Ginni has been a Tax-Aide volunteer for 4 years and brings a wealth of computer and programming experience with her. She has quickly adapted to the new National VMIS system, participated in the stress testing of the Taxwise Online, and created a program which allowed all the volunteers to receive their New York State Training exam results.

Because of the new VMIS system and the move from the ShareNet to the Volunteer Portal, Ginni has been receiving similar questions from a number of volunteers. It is critical that all volunteers get familiar with the Volunteer Portal. This is THE PLACE to go to get technology and training information, order supplies, report your site activity, and request reimbursement.

Here are the most common questions and answers:

Q. Why do I need to have a unique email address?

A. AARP uses your email address to identify you and your roles. It defines what you can do in the portal, and is used to send emails that are important for you to receive based on your roles. Because of this it must be unique within AARP. If another person has registered with the same email address in the AARP site, even if they are not a volunteer, there's a problem. Most email providers allow you to create more than one email account, and there are a number of free email sites so this should not be a problem. You just need to remember to check that special account periodically.

Q. How do I change my email?

A. Because your email is used to identify you, it requires special handling. Notify me (ginni@nycap.rr.com) and I will update your volunteer record. You must also send an email to HelpDesk@aarp.org to have your Volunteer Portal login email address changed – I cannot update Portal login information.

Q. How do I change my address and phone number?

A. As a volunteer, you may change your mailing address and residential telephone number by logging into the portal and click on "Update Profile".

Q. Why do we need to do Activity Reporting now that the number of returns processed is done automatically?

A. Although the Local Coordinators no longer need to keep track of and enter the number of returns submitted for a site, it is important that the assistance we provide to taxpayers that doesn't result in an electronically submitted tax return is also recorded. Although the IRS cares only about the number of submitted returns, the AARP Foundation is concerned with the total number of people that we assist, and this information is needed to secure funding and meet grant reporting requirements. When you speak with a taxpayer that doesn't need to submit a return, when you assist a taxpayer that can't submit electronically, or any other circumstance in which you interact with a taxpayer but an electronic return is not submitted, this must be recorded in the portal as Q & A or paper return and submitted monthly.

Q. Where can I get more information on how to proper complete the Activity Reporting?

A. I strongly suggest that every LC and DC view the Brainshark presentation "Activity Reporting Training for DC and LC 2013" which is available in the portal under Volunteer Sharenet/Portal Application Support/Site Activity Reporting, which provides detailed instructions. There is also a PDF of the presentation available for download and printing.

Q. What are my reimbursement options this year and how do I submit my request?

A. There are two Brainshark presentations which can be found on the portal under Volunteer Sharenet/Portal Application Support/Reimbursement called "FAST Reimbursement Flat Rate Submission 2013" and "FAST Reimbursement Flat Rate Approval 2013". Both of these are also available as PDFs for download and printing. New this year is the ability to have reimbursements direct deposited to your account. More information will be provided as we near the end of our tax season.

Volunteer Spotlight

This past year, the Fellow Award was established by the AARP Foundation to recognize long and distinguished service of our volunteers. Each State is limited to five awards per year, not to exceed 1% of your total volunteers.

Please join me in recognizing the

2012 NY3 Fellow Award Winners

- David Aikens
- Tom Griffiths
- Marcia LaPierre
- Frank Machung
- Ron Streeter

The Fellow Award Lapel Pin

The NYS Taxation Department improved their Income Tax Worksheet (TP-301) by adding the required form numbers for some of the events listed. This is helpful when a preparer must enter a claim for a tax benefit or obligation.

- The NYS Department brought us a welcome change in the process for handling Power of Attorney documents. The revised procedure to allow the client to keep a copy attached to the signature form is much more efficient than the 2011 process. However, the IRS process has not changed so you must continue to submit the forms.
- The NYS tuition credit (IT-272) includes only tuition (books and other expenses must be excluded from the IRS total), but credit is based on tuition expenses up to $10,000 for undergraduate studies only.
- Be sure to verify qualified retirement age when there is a Code 3 on the 1099-R. Also, for a Code 4, if the decedent would have been eligible for the NYS exclusion, the recipient may be eligible even if he/she has not reached retirement age.

Letter From the Editor:

I began volunteering for the Tax-Aide program in 2005 as a Counselor and was so concerned about preparing a quality return that I never thought about what it took to manage the program and the volunteer efforts. I just showed up for training, completed my certification, and showed up once a week to prepare returns at the site in my community. I had never been given a Client Service Provider Digest and only accessed the volunteer website to get information about submitting expenses and preparing returns. It was great being in my own little world.

Then, in 2009, I was asked to join the NY3 State Management Team (SMT) as the Partnership and Communication Specialist (PCS). I had no idea there was a SMT and not a clue about what they did or what the PCS was supposed to do. I was provided a description of the position and told there would be training and support for the team. I thought it might be interesting to get more involved so I agreed. As a member of the SMT, I quickly realized that managing a group of over 600 volunteers in 29 different counties didn't just happen by itself. In addition to the SMT, which includes the following 6 positions, State Coordinator (SC), Technology Specialist (TCS), Training Specialist (TRS), Administration Specialist (ADS), Partnership and Communications Specialist (PCS), and Prospective Volunteer Specialist (PVS), it takes the District Coordinators and all their support staff.

In 2010, Ron Streeter stepped down as the PVS and I offered to take on that role as I thought it fit quite nicely with my PCS role. At that time, we had very few new volunteer applicants and they all came through National via mail or phone. In 2011, the volunteer portal was developed and NY3 was asked to be a part of the pilot program. It was exciting to be part of something new but also frustrating as things didn't always go as planned. Now, 3 years later, I can't imagine what it would be like without it.

As the NY3 PCS for the last 4 years, I have had the opportunity to meet so many incredible volunteers and other members of the community who really value the service we provide. I have been amazed at the amount of support I have received just reaching out and telling our story to our libraries, schools and other social service organizations. But now, it is time for me to pass the torch and let another volunteer experience the satisfaction and learning that comes from being more involved.

So, as I publish my last newsletter, I encourage you to think about volunteering for the Partnership and Communication Specialist position. The organization needs you to become involved and you will get back much more than you can ever imagine!!

Regards,
Colleen Mooney

P.S. All those interested should send an email to Ed Hogarty (emhogarty@gmail.com)

Please submit suggestions, articles or volunteer recognitions to:
cmooneytaxaide@gmail.com