

Carryforward of Taxpayer Data

Across All VITA/TCE Sites

TaxSlayer Carryforward: Normal – Extended – Global

Normal Carryforward

- **When:** 2018 Filing Season and future seasons
- **What:** Carryforward from prior-year returns prepared at the **SAME** Tax-Aide site
- **How:** Counselor automatically given option to use some or all of data.

Extended Carryforward

- **When:** 2018 Filing Season
- **What:** Carryforward from a Tax Year 2016 return prepared at **ANY** still active Tax-Aide site.
- **How:** Counselor automatically given option to use some or all of data.

Global Carryforward

- ~~**When:** 2019 Filing Season and future seasons~~
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- ~~**What:** Carryforward from **ANY** still active VITA/TCE site (including Tax-Aide sites) if taxpayer consented in prior year.~~
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- ~~**How:** Counselors will need to ask for consent each filing season starting in Filing Season 2018. Denying permission will not impact e-filing that year or normal carryforward at the **SAME** site in following year.~~

Carryforward Data

- Does **not** include complete tax return
- Does **not** include income information from payers

Carryforward Data (cont)

1. Name, Filing Status, SSN/ITIN, DOB, phone #
2. Dependents Name, DOB, SSN/ITIN, relationship
3. W-2 (employer EIN database)
4. Form 1099-R (payer EIN database)
5. Schedule D (Capital Loss carryforward)
6. Schedule C (name, business code, and description)
7. Schedule E rental information and Schedule K-1s
8. Child care providers with dependents claimed
9. Banking information for Direct Deposit
10. Schedule B financial institutions information for Form 1099-INT/DIV
11. State and local refund worksheet
12. Return Notes

If in previous year's return

Counselor can choose which, if any, items to carryforward

Do **NOT** carryforward banking information

Consent for Global Carryforward

- **AARP has determined that we will DENY Global Carryforward. Do not ask the taxpayer – simply click the ‘deny consent’ button. Use the zipcode of your site as your code and enter the date.**

Consent Status

I / we, the Taxpayer have read the above information. By typing in my / our taxpayer PIN(s) and checking this input, I / we hereby **GRANT** consent to "Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites" as stated above.

I / we, the Taxpayer have read the above information. By typing in my / our taxpayer PIN(s) and checking this input, I / we hereby **DENY** consent to "Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites" as stated above.

Primary PIN (enter 5 numbers)

Primary PIN Date

Q&A

Q Why are we being asked to DENY all Global Carryforward?

A AARP has been in discussion with TaxSlayer and the IRS so that the taxpayer will not have to SIGN another paper permitting Global Carryforward.

Now the IRS has determined that a signature will be required. AARP has determined it will OPT OUT of the Global Carryforward process.

Instead, it will try to continue the EXTENDED Carryforward that makes carryforward to AARP Tax Aide sites automatic.

Global Carryforward

