

Tax-Aide News' n' Notes

VOLUME 7, ISSUE 6

MARCH/APRIL 2008

AARP TAX-AIDE

Meet Our New Volunteers

Stimulus Returns

- Write Stimulus Payment" at top of form
- Write "rebate" or "stimulus" in comments on sign-in sheet
- Does not have to be quality reviewed.

A hearty welcome is extended to new volunteers:

Sarah Abraham, Paul Battle, Dick Brown, Cindy Cape, Jim Cary, Angus McDougall, Sandra Frazier, Hilda Hardy, Donna Hood, Carolyn Key, Sherman Kline, Dick Laird, Raymond Lantz, Nancy Leahy, Marie Leisten, Patricia Meek, Barbara Middleton, Al Pollock,

Bernice Pratt, Carol Rosenthal, Beverly Ross, Linda Rusinek, Amanda Stephan, Daniel Weber and Jim Wilson.

Welcome back **Donna Grafton** and **Irene White** who have returned to Tax-Aide.

Welcome veteran Tax-Aide volunteers **Barney Davis, Bill Long** and **Karen Noer** who moved to the

Louisville area.

These folks have joined our core of enthusiastic counselors and client facilitators and are anxious to meet both new and former or returning taxpayers at the sites.

Please join us in making them welcome and appreciated. They are now part of the "Blue Shirt Gang".



Rebates

To get the rebates (Economic Stimulus Payments), taxpayers who have not been filing tax returns can now file. The filing of these rebate tax returns has put an additional burden on Tax-Aide because we are identified with seniors and the service is without cost to taxpayers.

There are two categories of taxpayers who are not required to file tax returns:

- 1 Taxpayers who have reportable income but it is not enough to cause the filing of tax returns.
- 2 Taxpayers with zero adjusted gross income such as Social Security, Railroad Retirement or Veteran's Benefits.

The first category returns can be e-filed or paper filed. Those with zero AGI can only be paper filed on

Form 1040A or 1040.

On the site sign-in form, counselors will write "stimulus payment" or "rebate" in the comments section. At the top of the 1040A or 1040 for either category, write "Stimulus Payment". These returns do not have to be quality reviewed.

For zero AGI taxpayers, the income must be at least \$3,000 to get rebates.

Inside this issue:

| | |
|-----------------|---|
| Stay Healthy | 2 |
| Security | 2 |
| Off to a busy | 2 |
| Offsite Returns | 3 |
| Looking Ahead | 3 |
| Site Visits | 3 |
| Cash | 4 |

Healthy Volunteers

Volunteers are exposed to the public during cold and flu season. We want all our volunteers to take precautions. Hopefully all had the flu shot and all use hand sanitizer frequently. But what about other preventive measures.

According to the Federal Center for Disease Control and Prevention, only about 2 percent of Americans 60 and older got a vaccine against shingles.

There are more than 1 million new cases a year of shingles, which causes a blistering and painful skin rash. Up to 200,000 result in severe nerve pain that can last for months or even years.

Anyone who has ever had chickenpox is at risk, especially those in their 60s, because the chickenpox virus hibernates for decades in nerve cells until erupting again.

According to the CDC about 2 percent of adults ages 18 to 64 got a booster shot against whooping cough in the two years since it hit the market.

Older patients usually recover, but whooping cough, also called pertussis, can cause weeks of misery. Worse, the bacterial illness can easily be spread to those not yet vaccinated.

Check with your doctor.

Security and Confidentiality

All volunteers are reminded that it is essential to carefully protect all equipment at all times. It is to be secured in locked storage when not in use and never used by any non-certified person. Be sure to transport it in a locked truck or unexposed area of your vehicle and remove it promptly - particularly in extremely cold or

hot weather.

Taxpayer information is confidential and shared only on a "need to know" basis. All worksheets should be returned to the taxpayer so they can store, keep or destroy them as they wish. No forms or records are to be kept unless necessary for the supporting the e-file documents.

Taxpayers often ask "**how long should I keep my returns and records?**" There is no law nor regulation, however the statute of limitations runs for three years from the date the return is due for federal returns and four years for Kentucky. Records of assets should be kept from date of acquisition plus at least the years noted above.

Off to a busy start.. and at the top of the heap!

Most sites were busy throughout the month and many even had to turn folks away on opening day - and many other days too. Everyone is getting a good workout and providing a service that is well appreciated.

Several taxpayers have called

the office to say thanks for a "job - well done". And speaking of well done, we're at the top of the heap with **100% Quality Review of each and every return.**



It's not hard to find News' N' Notes - go to our web site.

In a continuing effort to wisely use our limited funds, our newsletter is distributed at sites or classes during January - April.

Help file rebate returns offsite

Local Tax-Aide has received requests from various senior centers wanting assistance with filing rebate returns. The centers have low income residents who haven't filed returns in many years and many of them are eligible for the rebate.

One center proposed renting buses and vans to transport residents to our sites, but that would put a further burden on

our already over extended site



work. Most sites have been turning away taxpayers.

Therefore, it is proposed that groups of volunteers go to the facilities. A site could have volunteers meet at the facility on their "extra February day". LCs, talk with your volunteers to see if they will participate, then contact your DC. Individual volunteers contact your DC or call the office to leave a message.

Looking Ahead

Recruiting is a year 'round job and there is already a list of potential volunteers for the 2009 tax season. Send the name of prospects to the office e-mail address or call the office and leave a voice mail. Also, potential volunteers can use our web site to complete an application:

www.aarp-tax-aide-lou.org

They'll be contacted with pre-

liminary information and will be invited to attend an orientation meeting this fall.

Some of our taxpayers may be good prospects for client facilitators - if they appear interested be sure to ask and invite them to consider helping share the load. It's only a 10 - 11 week commitment from February 1 - April 15 each year.



**Last day sites are open
Tuesday, April 15**

Site Visits



We are always happy to have "official visitors"

at the site - preferably after we have settled in for a few weeks. The public should know that

our counselors are well trained and certified by passing various state and federal tests before serving the public.

Official visits may be made by the US Treasury Department, the IRS, the Kentucky Department of Revenue and regularly

by our own District Coordinators.

In February, IRS made official visits to two sites. At each site, three returns were reviewed, and the IRS reports were glowing about the quality of the returns and the site management.

AARP TAX-AIDE

10401 Linn Station Road
Suite 121
Louisville, KY 40223
(502) 394-3443
loutax-aide@insightbb.com

District Coordinators
Dick Trowbridge
Julia Carey

This is the last newsletter for 2008 tax season. Be sure to check our web site on a regular basis, it often contains last minute messages of interest. LCs and EROs also need to check their special section for items needing their attention. Thanks to Roman Rusinek for maintaining and updating the site - it receives many accolades.

Thanks to our wonderful and energetic volunteers. A majority have doubled up and worked at multiple sites and/or multiple sessions this year. Some have even worked five or six days each week - quite a feat for "retirees".

Thanks also to those who provide site facilities. Sites are located at 6 government centers, 4 churches, 3 libraries, 3 senior centers and a hospital.

Thanks to our friends at Kentucky AARP, IRS and Kentucky Department of Revenue.

WWW.AARP-TAX-AIDE-LOU.ORG

NOTE: ACTIVE VOLUNTEERS NOW HAVE A SPECIAL SECTION ON THE WEB SITE. GET THE USER NAME AND PASSWORD FROM YOUR DC.



Cash Contributions - New Recordkeeping Rules

Beginning with 2007 tax years, recordkeeping requirements for cash contributions became stringent. In essence, the Internal Revenue Service made the recordkeeping rules for cash contributions the same as it is for all other deductions.

Cash contributions include those paid by cash, check, etc. A deduction cannot be claimed, regardless of the amount, unless the following records exist:

- A bank record that shows

the name of the qualified organization and the date and amount of the contribution or

- A receipt (or letter or other written communications) from the qualified organization showing the name of the organization and the date and amount of the contribution.

Tax counselors and quality reviewers are to be alert to these new rules. Taxpayers are to be

advised of the rules. With the introduction of these new regulations, the old days of deducting cash contributions without records are gone. Counselors will apply the same approach to cash contributions as they do to any deduction.

Counselors and reviewers are encouraged to read Chapter 24, pages 160 and 161 of Publication 17 and page A-8 of the 2007 1040 Instructions.

