



AARP TAX-AIDE

Thanks to the many folks who help our program, particularly those providing classroom space:

- AARP Kentucky
- Buechel Fire Department
- Douglass Boulevard Christian Church

Students, be respectful in the use of these facilities. Pickup your trash and put in waste containers. Keep your workspace neat and clean. Be quiet in hallways and common areas.

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Reporting System Simplified

The dreaded CARs (Counselor Activity Reports) are dead.

This year volunteers will have a new reporting system at sites. First is a new taxpayer sign-in sheet which is administered by client facilitators and/or local coordinators. A similar procedure was used last year by many sites. After the taxpayer signs in, the assigned counselor will initial the sheet by the taxpayer's name, then the quality reviewer will also initial it. A big change is hours are no longer recorded. This procedure assures more accurate reporting especially for quality reviews.

The second phase is the

reporting by local coordinators. Local Coordinators will have one sign-in sheet per day rather than CARs prepared by volunteers. This new system will require only six pieces of information (all taken from sign-in sheets):

- Current Federal Returns,
- Prior Year Federal Returns,
- Amended Federal Returns,
- State Only Returns,
- Questions & Answers Only, and
- Quality Reviews.

With the advent of a majority of returns being prepared electronically, a bulk of the statistical records will come automatically when the returns are

transmitted. Local Coordinators will sign on a special web site, then they will add the six items listed above to the site's statistics for the prior four weeks. Even though LCs are reporting three times instead of two during the tax season, the amount of data required to be input is much less than in the old reporting system.

The new system will be covered at Client Facilitator's classes. Further, Local Coordinators will detail site procedure during pre-opening meetings which will occur sometime during January 29 - 31 or February 1. With these system changes, it is important that volunteers attend site meetings.

We Do... We Don't (LCs & Instructors, please note)

The IRS publication of tax issues and forms that **We Will and Won't** do is displayed at each site. The purpose is to ensure that volunteers stay within the scope of Tax-Aide training. This year there is a variance with IRS's list

and that of Tax-Aide. The 2007 Tax-Aide Training Guide, page 23, (yellow book) adds to the **We Do** list: Form 8880 (Qualified Savings Credit), Form 8379 (Injured Spouse), 1040X (amended return, if

trained), limited K-1s which shows partnership, estate and S-Corp distributions for 1040 Schedules B or D and contributions to charities from an IRA. Note the last two items are new to Tax-Aide this year.

“IF YOU TELL THE TRUTH, YOU DON’ T HAVE TO REMEMBER ANYTHING. ”

MARK TWAIN

“You can’t teach ethics. You either have them or not.”

“GOOD PEOPLE DO NOT NEED LAWS TO TELL THEM TO ACT RESPONSIBILITY, WHILE BAD PEOPLE WILL FIND A WAY AROUND LAWS. ”

PLATO

Local Coordinators, EROs by Site

<u>SITE</u>	<u>Local Coordinator</u>	<u>ERO</u>
Central Government Center	Carol Easley	Chuck Blattner
Clifton Christian Church	Barbara Malone	Dick Trowbridge
East Government Center	Bill Kugler	Bill Kugler
Highland Baptist Ch (Shelbyville)	Marvin Rogers	Marvin Rogers
Hillview City Hall	Bill Schook	Bill Schook, Marty Tittlebaum
Iroquois Library	Bill Jasper	Bill Jasper
Jeffersontown Senior Cit. Ctr	Bill Long	Keith Bayne
Lyndon Baptist Church	Roger Crum, Roman Rusnek	Roger Crum
Mt Washington Library	Mary Thompson	Mary Thompson
Oldham County Com/Conv Ctr	Mary Stewart	Dave Nuermberger
Portland Library	J. B. Hitt	Judith McCandless, Jerrye Davis
Salem United Church of Christ	Jim Miller	Bob Lukes
Sts Mary & Elizabeth Hospital	Suzanne Douthat	Anne Bobigian
St Matthews Atria Center	John Emmerich	John Emmerich
Shively Municipal Building	Al Eisert	Al Eisert
Southwest Government Center	Sherron Bell	Martha Dues, Dan Dues
Special Sites	Bob Pessolano	Bob Pessolano
Urban Government Center	Bill Giles	Bill Giles

This group of leaders, along with instructors, have stepped up to do more for Tax-Aide. Counselors' and Client Facilitators' cooperation and support at sites makes leaders responsibilities easier. Thanks to all volunteers for the time and leadership given to our program.

Tutors Needed At Iroquois Library

The Iroquois Library is in need of volunteers who are interested in working with middle school students to answer questions concerning homework (primarily math). They are looking for volunteers who could spend one hour a week helping the students. The days/times would be Monday through Friday between the hours of 5:00 to 7:00 pm. If you are interested in this volunteer opportunity, please contact Joan Bruckman (Iroquois Library Assistant Manager) at 574-1720. The Library is located at 601 West Woodlawn Avenue.

Extra Help in February

Many sites are open extra days in February and these sites can use extra help. Sign-up sheets for these extra February days will be passed out in classes. Please give all the time you can.

Special Sites Schedule for 2008

Special Sites New Local Coordinator Bob Pessolano has announced the schedule for 2008:

Main Library Downtown - February 2, 16 and March 15, 10 AM to 2 PM

Goodwill - February 8 and 9, 9:30 AM to 1 PM

Ponder Creek - February 14, 1 to 4 PM

Friendship House - March 13, 1 to 4 PM

Treyton Oak Towers - March 20, 9 AM to 2 PM

Brownsboro Park - March 22, 10 AM to 2 PM

Presbyterian Home - March 25, 10 AM to 2 PM

Chapel House - March 27, 1 PM to 4 PM

Forum - April 1, 9:30 AM to 1:30 PM

If you can, sign up to participate in this program during your January class.

Bob also is the LC for our shut-in program. Two tax counselors go to a shut-in taxpayer's home to prepare tax returns. Counselors are needed. Call Bob at 394-3443.

Tax-Aide sites open Friday, February 1.

Tax-Aide sites will be open on President's Day, Monday, February 18.

IRS Clarifies Qualifying Child for Claiming Unrelated Child

Since the IRS Code changed a couple of years ago, counselors have struggled with issues of "qualifying child". IRS issued a notice, N-2008-05, December 18, 2007, which clarifies a taxpayer claiming a dependency exemption for an unrelated child. If the parent (or other person to whom the individual is defined as a quali-

fying child) is not required to file an income tax return and does not file a return, or files a return solely to obtain a refund of withheld income taxes, then the child is **not** the qualifying child of that parent. This purports that **if a taxpayer meets all other tests**, an unrelated child can be a qualifying child of the taxpayer for

purposes of the dependency exemption. This new clarification is retroactive to January 1, 2005, which can cause some amended returns to be filed. Also it opens up questions of filing status and earned income, child and child care credits.

All will be discussed in detail in classes.

NOTE:

The IRS clarification mentioned to the left causes some of our written material to be incorrect. The example on page 6-6 of Pub 4491 needs reinterpretation.

New Associates Named

To assist with our growing e-file classes, three new associate e-file instructors have been named: Bill Kugler, Bill Giles and Dave Nuremberg.

To assist electronic return originators at sites, three new associate EROs have been named: Dan Dues at Southwest Government Center, Marty Tittlebaum at Hillview City Hall and

Jerrye Davis at Portland Library.

Thanks to these six volunteers for taking on this additional responsibility.

Also thanks to Bob Lukes, Charlie Rickert, Dick Trowbridge and Julia Carey for recent donations.

New Computer for Christmas!

Did Santa Claus bring you a new computer for Christmas? If so, continue being good and donate your old one to Tax-Aide. Laptops are especially welcomed.



HAVE TO MISS CLASS ONE DAY? TELL OR CALL YOUR LEAD INSTRUCTOR.

AARPSM

FOUNDATION

AARP Tax-Aide
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(502) 394-3443
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District Coordinators
Dick Trowbridge
Julia Carey

WE' RE ON THE WEB!
WWW.AARP-TAX-AIDE-
LOU.ORG

Former Supreme Court Justice Robert H. Jackson described the federal income tax process as “a system of taxation by confession. That a people so numerous, scattered, and individualistic annually assesses itself with a tax liability, often in highly burdensome amounts, is a reassuring sign of the stability and vitality of our system of self-government.”

Tax-Aide News' N' Notes is a publication for volunteers of AARP Tax-Aide in Bullitt, Henry, Jefferson, Oldham, Shelby and Spencer Counties, Kentucky.

KY Offers Free Roadside Assistance

Free roadside assistance is available on Kentucky interstates and parkways.

SAFE Patrol operators from the Department of Transportation have undergone two weeks of intensive training to prepare for general vehicle repairs, accidents and incident management, CPR and first-aid, weather watch, and security issues. Response can be provided to all types of transportation incidents, including those involving trains, cars, trucks, buses or even airplanes.

SAFE Patrol operators drive assigned routes on interstates or parkways. They assist motorists by providing gasoline and oil for those in need, add air to tires or change flat tires, provide a “jump” for dead batteries and other minor automotive repairs.

The patrol is being expanded to 27 vehicles with 36 operators. The patrol covers all of Kentucky's nine parkways and five interstates, along with heavily traveled Kentucky 80 and U. S. 23 in eastern Kentucky.

Put this number in your cell phone so if ever you need roadside assistance while traveling Kentucky interstates and parkways, you can get the help you need.

1- 877-FOR-KYTC or

1- 877-367-5982

