

TAX-AIDE NEWS ' N' NOTES



Volume 8, Issue 7

March 2009

GREATER LOUISVILLE AREA TAX-AIDE

Weather & Forms Delay Start-Up

Several sites had to delay their opening due to the weather—snow, ice and windstorms created havoc in slippery parking lots, streets, trees down, no power, etc. etc. etc.

Many volunteers were without power, phone and internet service so communications were limited at best.

To offset the delay, earlier starts and delayed closings proceeded with limited volunteers making it to the sites.

Hundreds of phone calls and e-mails were handled by the support staff at the office.

Long lines seemed to be the standard at most locations with numerous clients being advised

to return at a later date.

As calls were answered, particular attention was drawn to the need to have accurate information regarding the Stimulus Rebate received by many. Inaccurate information causes returns to be rejected.

1099's Delayed

Another issue involves the delayed schedule for various 1099 forms to be distributed. The delay, coupled with corrected forms suggest that person with these forms defer filing until sometime in March. Some types are not required to be mailed to taxpayers until February 15. Avoid long waits and problems and file later in March or early April.

Be Alert for New Volunteers

Most of us do not begin with Tax-Aide until we reach retirement so our tenure is somewhat limited.

As we prepare returns, try to be alert to identify clients who might be interested in becoming a volunteer for the program. We generally need to recruit at least 25-30 or more new preparers each year, especially in view of the anticipated growth expected for tax year 2009.

The recently adopted legislation will dramatically increase the number of persons needing assistance with their tax return.

Send in the names, addresses, phone and e-mail info with your comments and suggestions.

Where's My Refund ? When do I have to pay?

Under optimal conditions, a refund for a federal return filed electronically can be credited to an account in as little as 8 days—but it's better to allow 15 days. If a check is to be mailed, add an additional week.

If a payment is due, an advantage of filing electronically allows the taxpayer to file early but delay payment until April 15.

Paper returns that are mailed typically take 6-8 weeks for refunds. Payment of taxes due

must be paid at the time the return is mailed to the IRS or state.

To inquire about the status of a refund, the IRS phone is 1-800-829-1954 or 1-800-829-4477. Contact KY at 502-564-1600.

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Welcome

To

Spring

It Arrives

March 20



IMPORTANT DATES

Feb 2—Apr 15

Sites open as scheduled, Mon—Sat.

Sites will also be open on general holidays that fall during the week.

Closures are verified by phone chains for each site. Check for school closings in the respective school districts. Sites are open regular hours when there are delayed school hours.

Mar 3—Feb stats due

Apr 3—Mar stats due

Apr 20—Apr stats due
Leaders Meeting

*I don't feel old.
I don't feel anything until
noon. Then it's
time for my nap.
-- Bob Hope*



It's Tax Time

Software, Equipment & Other Changes

Wireless Printing is being tested at several sites this year with hopes of expanding it for the 09-10 season. TC **Bill Long** is our lead tech for these installations.



The advantage is to eliminate draping cables around the room and also the ability to reduce the number of printers needed for each site.

Test sites include J-town, **S h i v e l y**, Spec Sites and Central Government Center.

TaxWise Updates are up to version 7, causing ERO's to be certain that all cpu's are using the same version. KY 2 is

the current state version.

Several problems have occurred with both old and new laptop and desktop units as the season begins. TC's **Larry Curtis, Long, John Emerich, Al Eisert and Dick Trowbridge** have been putting in extra hours to keep things running.

Maintaining security and confidentiality are a paramount concern for all

Personal Tax Planning & Savings Ideas

RECENT DONORS

Several friends of Tax-Aide have donated equipment, supplies and/or services since our last listing.

Thanks to Charlotte & George Huber, Al Eisert, Dave Nueremberger, Donna Peak, and several anonymous donors. These gifts make our job easier and quicker too—you may be able to claim a deduction too.

ITEMIZING

One of the advantages of itemizing deductions is that the TaxWise software will help determine if it is to the taxpayers advantage on the federal return.

Once that issue is decided, it is almost always to the advantage of the client to itemize on the KY return.

An often missed item by clients is the mileage going to and from the medical offices, clinic's and hospitals. For many seniors, it adds up quickly.

There are several differences in the treatment between the federal and KY returns, insurance premiums and long term care are just two of the differences.

Thanks to Salem UCC, Buechel FD & AARP

Finding facilities to accommodate daily and weekend classes is a major task each year.

Thanks to the Salem United Church of Christ on Newburg Road, the Buechel Fire Department, and the KY AARP office, we were again able to hold the regular January classes.

Because of equipment needs and setups, our use of these facilities required exclusive use for several days at a time.

The KY AARP large conference room was in use every day throughout January—excluding the numerous other groups and activities that typically use the facilities.

In addition, we also used the small conference on a almost daily schedule.

Thanks to each of these fine institutions for their generosity and understanding. Without their help, goodness knows where the classes might have been held?

*They have made the difference —**THANK YOU!***

Special Sites & Temporary Locations

| Site Location | Days Open | Hours Open |
|--|---------------------|-------------------|
| Friendship House 900 S 4th St | Thurs, Mar 12 | Noon – 4 pm |
| Main Library Downtown 301 York Street | Sat, Mar 14, 21, 28 | 10 am—2 pm |
| Chapel House 945 S 5th St | Thurs, Mar 19 | Noon – 4 pm |
| Treyton Oak Tower 211 West Oak | Thurs, Mar 26 | 9:30 am -1:30 pm |
| Presbyterian Home | Tues, Mar 31 | 10 am – 2 pm |
| Brownsboro Park | Sat, Apr 4 | 10 am – 2 pm |
| Forum 200 Brookside Dr | Thurs, Apr 9 | 9:30 am – 1:30 pm |
| | | |
| | | |

ShutIn service is available on a very limited basis and only to those unable to leave their home. Each site is asked to help in their area.

The AARP Tax-Aide program is sponsored by the AARP Foundation in cooperation with the Internal Revenue Service.

It has over 32,000 volunteers and in excess of 7,500 sites and is the largest volunteer tax preparation group in the nation. It is the major group in the IRS Tax Counseling for the Elderly.

The service is free to all persons needing assistance in preparing their federal and state tax returns.

Doing it right.....as easy as 1, 2, 3 !

Taking a few extra minutes can save lots of time later—particularly if there is an identity problem, a wrong EIN, a transposed number, or any of seeming endless other potential problems or errors.

1– INDENTITY VALIDATION is an important first step when preparing a return. A photo ID and Social Security card or other identifying documents for the taxpayer and others that are included on the return. Many of our clients return year after year but we also have new people so we need to be cautious and protect our clients.

2—INCORRECT FORM W-2

If a problem is discovered with the taxpayer's SSN on Form W-2, encourage them to request a corrected Form W2 from their employer.

DO NOT change any information on a W-2. If e-filing, the facsimile made on the

computer must be exactly the same as the W-2.

3-SITE IDENTIFICATION NUMBER

It is important to make every return count for your site and this is done by entering the SIDN in the proper location. On a paper return, this is entered in the Paid Preparer's section of the tax return in the SSN or PTIN field.

If filing electronically, make sure that the proper defaults are set. Check with your ERO in case of a problem.

Our returns do not identify the individual preparer but they do identify the site so be sure your site gets proper credit for every return.

Avoid rejects and do it right the first time.

Remember, it's as easy as 1,2,3!



AARP TAX-AIDE

10401 Linn Station Road
Suite 121
Louisville, KY 40223
Your Address Line 3

502-394-3443
LouTax-Aide@insightbb.com
Www.aarp-tax-aide-lou.org

**Watch for
INTERIM
UPDATES &
NEWS REPORTS
AT**

www.aarp-tax-aide-lou.org

News'N'Notes is intended primarily for volunteers of the Louisville Area AARP Tax-Aide Program. Generally issued monthly from August through April and is also available on the web site under the "News" tab at www.aarp-tax-aide-lou.org.

District Coordinators Al Eisert and Dick Trowbridge

NOTICE

To have your taxes prepared properly,

YOU MUST HAVE

IRS Notice 1378

showing the amount you received for the
Economic Stimulus Payment or
definite knowledge of the amount received in 2008.

Call 1-866-234-2942 or

www.irs.gov/individuals/

article/0,,id=185471.00.html

Do it today!

Be Sure

To

Change

Your

Clock

On

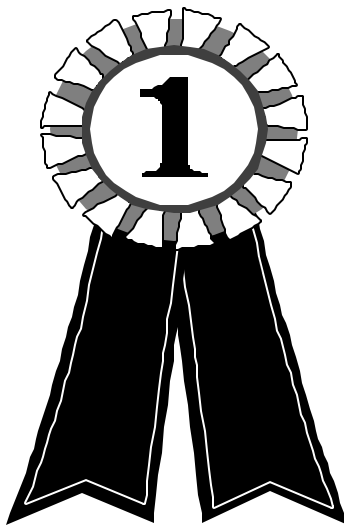
Mar 8

It's

Daylight

Savings

Time



**Happy
St. Patrick's Day**

New Volunteers Catching on Quickly

Although smaller in number than in previous years, the new volunteers helping with Tax-Aide are making their mark with tax payers. Counselors and Client Facilitators both had adapted quickly and jumped in with both feet.

The press of numerous clients leaves little time for starting slowly before getting up to speed. Congratulations to each for a job "Well Done".

A comforting factor for all counselors is the standard calling for **100% Quality Review**. Each and every return must be reviewed by another certified preparer to insure the continued high standards of the AARP Tax-Aide program.

Taxpayer information is shared only on a "need to know" basis so this generally boils down to the screener, preparer and quality reviewer.

All information and worksheets are returned to the taxpayer and the preparer retains only such information as may be required for electronic filing. For paper returns, nothing is retained by Tax-Aide.

Computers are completely cleared of all taxpayer records at the end of the season with a master copy provided to the IRS for safekeeping.

Welcome New Volunteers....and thanks for helping!