

Date: January 13, 2012
To: ERO
Cc: TCS, SC, NLT, NTC, TC
From: National Technology Committee, AARP Tax-Aide
Subject: ERO Bulletin 2012-02: TaxWise 2011 Information

ERO Bulletin is a new communication specifically for EROs. It was introduced last year as test and it was overwhelmingly accepted and requested that it be continued at the end of the tax season. We do recognize the importance of keeping our first line e-filers informed as new information and features are introduced.

Unique User Names

The new 2011 Pub 3189 currently states that each user of TaxWise, Desktop and TWO, are required to have their own unique user name. We immediately recognized the complexity and additional work this requirement causes EROs using the Desktop software; particularly at larger and stand-alone Desktop sites. After much discussion, the IRS has finally agreed to change this from required to highly recommended. Due to some of the problems that were found during last year's field audits, they still want to insure that the original return preparer can be identified. With our required use of the Prep Use fields this is still identifiable. The IRS further said that if a site is discover to not have unique user names for all of their preparers, this will not result in a failed field audit.

Sample E-File Tracking Log

The attachment is a suggested way to use the E-file Tracking Log. There are detailed instructions on the back of the form for the Activity Reporting, but we felt it was also necessary to provide some suggestions on how to use the E-File Tracking Log. You need to review these recommendations and work out a method that works best for you own site. It is essential that each site keep track of the returns to insure that both federal and state returns are filed in a timely manner, and that any rejected returns are fixed and also re-submitted in a timely manner. Blank forms are on the "Forms" page on the Volunteer ShareNet and the "Forms" tab on the Extranet. This suggested E-File Tracking Log will be posted in the Training section under Technology Hardware.

Linked vs. Unlinked State Returns

This has also been a hot topic recently. The IRS and TaxWise have agreed to provide further information and guidance on this topic. We expect to distribute another ERO Bulletin next week with this information

Who Do I Contact?

Attached is another document that has been created to help you access the correct hardware and technical support from TaxWise and the IRS. The document also includes and escalation process to use if you do not receive a satisfactory response to your issue/problem.