

New Hampshire AARP Foundation Tax-Aide

TY2015 Kickoff Meeting

2015-Oct-22

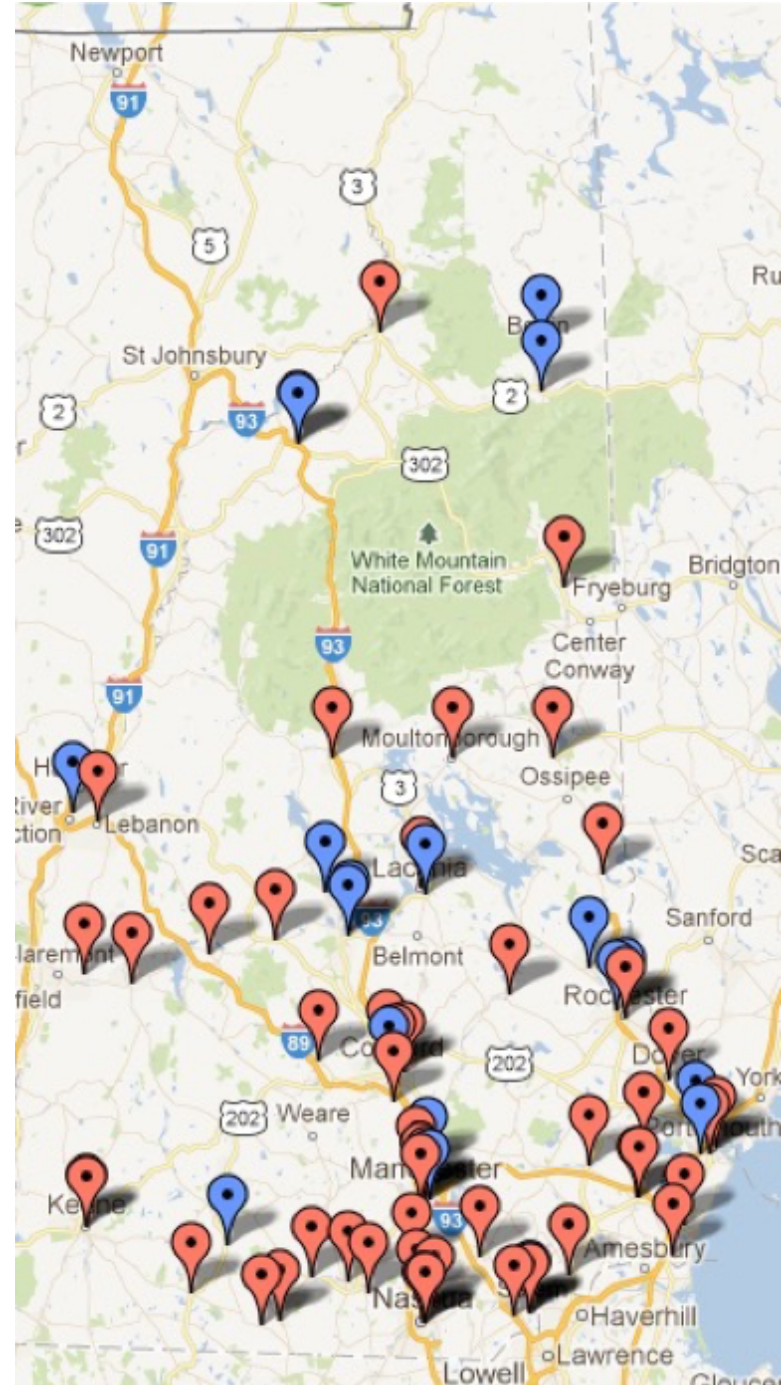
Agenda

- Introduction
- Recap: what we did and why we're awesome
- Recognition: who's particularly awesome
- What's new
 - State Leadership
 - Tax Law
 - Scope
 - Tech
 - National Tax-Aide
- IRS - Gregg
- Tech - Lance
- Training - Deb
- Portal - Vicki

Tax-Aide NH

We're about 300 fabulous and amazing volunteers who did over 13,000 returns at over 50 locations and put \$14.2 million dollars back into our neighbor's pockets (and took ~\$2.4M out). All for a total cost of around \$20,000. As the leaders of the program, you ensured our volunteers could do this.

Thank you!



New Hampshire
Tax-Aide Volunteer of the Year

Fred Kollmorgen

Review of NH Tax-Aide: State Leadership

ADS	Vicki Laforet	laforetv@gmail.com
PCS		
PVS	Charles Caldwell	charles.caldwell@graniteuw.org
TCS	Lance Pratt	lpratt14g@aol.com
TRS	Deb Hatcher	deb-hatcher@earthlink.net
SC	Jan Nedelka	jan@nedelka.net

Review of NH Tax-Aide: District Leadership

D01	North Country	Chuck Martindill	mdill@hal-pc.org
D02	Grafton-Sullivan	Gus Seamans	sea42@tds.net
D03	Carroll County	Jean Beadle	jeanmbeadle@gmail.com
D04	Concord	Diane Vince	concordtaxaide@metrocast.net
D05	Manchester	Stacy Somogyi	thesomogyis@comcast.net
D06	Monadnock	Bunny Peakes	bcpeaks@comcast.net
D07	Nashua	Steve Mandra	DC.Nashua@comcast.net
D08	Seacoast	Harvey Epstein	harveyiepstein@gmail.com

Tax Law Changes

- Not much change – good news!
 - Usual waiting game for congress to pass/not pass extenders

Scope Changes

- Not much change – more good news!
 - Added code L to 1099-R
 - May have change (increase) to Schedule C expense limit
 - Two seldom-encountered but difficult to prepare ACA cases now out-of-scope

Tech Changes

- Not much change – even *more* good news!
 - Sticking with Win 7
 - TaxWise Desktop is dead. TaxWise Online is only option now
 - We should be able to get all the hardware we need

National Tax-Aide Changes

- New Portal to manage all volunteer activities

Not good.



You know else is awesome?

Vicki

IRS - Gregg

New Hampshire AARP Tax- Aide Fall Meeting 2015

**Thank you all again for your
service to your communities!!**

VITA/TCE Sites New Hampshire 2015 Filing season

- 71 VITA/TCE Sites in New Hampshire
- 18,055 tax returns including MyFreeTaxes prepared up 7.6% from tax year 2014
- 61% returns filed single filers
- 19% Earned Income Tax Credit (EITC) returns
- \$4.2 million in EITC claimed
- \$19.3 million in refunds claimed
- **\$2.8 million in balance due returns filed**
- 96% returns e-filed
- 69% returns Direct Deposit
- Encourage Direct Debit for balance due returns
- **Fantastic results thanks to all of you!!!!**
 - **Nationwide VITA/TCE Program**
 - **3.7 million tax returns**
 - **\$3.9 billion in refunds**
 - **\$569 million in balance dues**

Filing Season 2015 revisited

- SPEC QSS Quality Site Reviews: Quality Site Requirements adherence rate 92.6%
 - 68% of Sites use Interview and Intake Process
 - 85% of Sites use a Quality Review Process
- SPEC QSS Reviews 94% accuracy rate
- No more one person Sites
 - Remote quality review
- SPEC Shopping reviews discontinued
- Remote Site Reviews
 - Boston Territory or other Territory personnel

2015 Filing Season revisited

- New Hampshire Field Site visits
 - Site not open as listed
 - ACA a definite challenge: new for everyone
 - 100% Intake & Interview process
 - 100% Quality Review Process
 - Possible one person site

2016 Filing Season Opportunities

- Maintain the focus on Quality
 - Use the “process”
 - Intake/Interview **and** Quality Review
 - **Conversations** with customers
 - Continue to question information that appears unreasonable
 - Interview/Intake process + Quality Review = Accurate tax return

2016 Filing Season Opportunities

- Updating Quality Site Requirements
 - QSR #2 Interview and Intake Process training required
 - QSR #10 Photo ID from every taxpayer to reduce identity theft exceptions allowed under “extreme circumstances”

Product Ordering Timeline FY 2016

- Electronic files for **all** training products available now on irs.gov
- Training materials are scheduled to arrive the week of November 13th
- Publication 4491-W e-product only
- Publication 5091(CD) Contains all training materials
- Publication 4961 VITA/TCE Volunteer SOC-Ethics Training
 - e-product only
- Publication 4480 Link & Learn Taxes kit
 - Includes Publication 4012 and VITA/TCE Test Form 6744

VITA/TCE Products FY 2016

- Link & Learn Taxes available early November
- e-products encouraged and all products are available on www.irs.gov
- Form 13614-C revised
- ACA now included in Publication 4491 Advanced certification Pub 5157 eliminated
- Publication 17 for VITA/TCE volunteers only
- Pub 4491-X published electronically January 2016 for late tax law legislation
- Optional e-module on Link & Learn for those who have passed Advanced module
 - Health Savings Accounts

TaxWise Filing Season 2016

- NH 100% TaxWise Online
- Form 8453/8879 questions ?????
- TaxWise to ship November 24th
- “10 to 21 days” for refunds due to Identity Theft

FS 2016 Tax Wise

- All training videos available for viewing/download at VITA/TCE Central on www.irs.gov
- Practice Lab: learntwo
- ACA affordability worksheet added
- Windows 10 ??????
- TWO issues behind us ?????? hopefully
 - Drop off method Form 14446 required
 - MyFreeTaxes
 - Free File

Modernized e-file/MeF reminders

- Year round e-filing
- Faster acknowledgements
- Prior year returns
- More plain language error conditions
- Allow Adobe PDF attachments to tax returns

Modernized e-file or MeF continued

- MeF is case sensitive
 - CCH recommends the use of CAPS lock throughout the preparation of the tax return
 - Punctuation or extra spaces on the Main Information sheet will cause validation errors
 - Special characters should not be used (i.e. hyphens, commas, periods)

Alternative Filing Methods

Facilitated or Self Assistance

- The VITA/TCE Program could not serve everyone who needs assistance if they all showed up
- 70% of taxpayers can prepare their taxes online at irs.gov for free
- 55.1% of all Tax returns filed in NH for Tax Year 2013 were “self prepared” including 44,790 EITC tax returns
- Certified volunteer assists customers
 - Assistance can be on site, via chat, e-mail, or phone
 - Remote option is the preferred method by customers
 - Nationwide 43.6 million people self prepared their own tax return in 2013
- Facilitated/Self Assistance an option in all 50 States
 - MyFreeTaxes-all 50 states free federal and state returns
 - Remote assistance available with certified United Way assistor
 - 204,960 returns prepared using MyFreeTaxes in 2014
 - 746 in New Hampshire

Alternative Filing Methods

Virtual VITA/Drop Off Method

- All SPEC VITA/TCE Quality Site Requirements
- Match resources to demand
- Opportunity for meaningful discussions with clients
- Remote tax preparation or Quality Review
 - Secure channels via fax, dropbox, etc.
- Intake Sites
 - Forms 14446/13614-C
 - Certified Intake person strongly recommended as best practice

Questions?????

- 603-628-7531
- Gregg Woodes gregg.p.woodes@irs.gov
- Internal Revenue Service/SPEC
1000 Elm Street Suite 900
Manchester NH 03101

Thank you all again!!

TCS - Lance

Lance Pratt
Technology Specialist
(TCS)

(Looking for a replacement)

Equipment Repair

1. Determine if under warranty or not
2. All requests are to be sent to service@graceworkz.com. Or by phone 866-448-0420
3. All computers and printers replace by GraceWorkz must be returned to GraceWorkz.

Re-Imaging & Security

- Should be done again this year. Waiting for Oct release.
- Updates should be automatic.
 - Microsoft Security Essentials
 - Windows Defender
- Krebs on Security Blog:krebsonsecurity.com
 - Excellent source of information on software vulnerabilities and updates

Items to be aware of

- Consumables will still be ordered by Harvey Epstein, again this year.
- Preferred operating system is Windows 7.
- Chrome works.
- Online Inventory Beta Testing
- 6110's that Nat'l has on inventory will be replaced (not any that they have listed as having been replaced)
- New site computer needs contact Jan Nedelka

TRS - Deb

Saint Vicki