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CyberTax TY2017-02: Taxpayer Information Carryforward

1 message

AARP Tax Aide <TaxAide@email.aarp.org>

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Reply-To: AARP Tax Aide <reply-fe9116777761027971-21_HTML-26607749-1380393-8@email.aarp.org>

To: bill@dornbush.net

AARP Foundation Tax-Aide CyberTax**January 29, 2018****To:** All AARP Foundation Tax-Aide Volunteers (with a valid email address in the Portal)**From:** Lynette Lee-Villanueva, Vice President and National Director, AARP Foundation Tax-Aide**Subject:** CyberTax TY2017-02: **Taxpayer Information Carryforward**

The IRS and TaxSlayer are implementing a new process for carryforward data across all VITA/TCE sites (including Tax-Aide) for filing season 2019, which applies IF the taxpayer gives permission for his/her information to be shared in this manner during the 2018 filing season. The understanding AARP Foundation Tax-Aide thought we had with the IRS has now been changed; therefore, we have decided not to move forward with this process. **All program Counselors need to be aware of and implement the following action:**

ACTION REQUIRED: Given this new requirement, AARP Foundation Tax-Aide has elected to **NOT** participate in the global carryforward program during the 2018 filing season. Each Counselor must select the "Deny" permission answer on the E-File page and enter a self-chosen five-digit PIN and the current date (two of each if a joint return). No discussion with the taxpayer is required nor encouraged. Selecting the "Grant" permission answer is not an option.

There is no impact on preparing and e-filing the current year return from this denial.

This type of carryforward data is beyond the normal "same site" carryforward information that we have used in previous years-in which TaxSlayer offers to pre-populate a current year tax return by carrying forward "structural information" from a taxpayer's prior year tax return when the taxpayer returns to the same tax site. This carryforward data will continue to be available next year in the 2019 filing season

For the 2018 filing season, Tax-Aide sites will have taxpayer information carryforward from a Tax Year 2016 return prepared at ANY still active Tax-Aide site. No permission is required for this since all Tax-Aide sites are part of the same Tax-Aide "firm."

Note: The standard TaxSlayer print sets will continue to include the consent form - it will not be removed so please do not send TaxSlayer messages asking to

remove the form. Each site is encouraged to create a custom print set that does not include the consent form.

Additional details about the carryforward process are available on the OneSupport Help Center in the Tax Training section.

As part of the Tax-Aide program, information including the latest updates and program guidance is regularly sent via email to all volunteers. Please click [here](#) if you are not a volunteer in the Tax-Aide program and therefore should be deleted from receiving further emails.