

# Clear Taxpayer Data

(Replacement for **TPClear**)

## Introduction

The Clear Taxpayer Data program is intended to remove all taxpayer data from a computer having TaxWise software installed or from disk drives containing tax return backups created by TaxWise software. This program replaces the TPClear utility program that was provided for this purpose prior to Tax Year 2009 (filing season 2010).

AARP Tax-Aide policy requires that taxpayer data be removed from computers and data storage devices at the end of each tax season, in some cases using this program. For detailed policy information regarding prescribed use of this program, please refer to the current version of the *AARP Tax-Aide Technology Management Guide* that is posted on the Manuals, Policy & Procedures tab of the AARP Tax-Aide ExtraNet.

## Program on the Extranet

Clear Taxpayer Data can be downloaded from the AARP Tax-Aide ExtraNet, [aarp.org/tavolunteers](http://aarp.org/tavolunteers). It is under the "Taxpayer Data Removal" heading in the Software section of the Technology tab.

After downloading start the program. The first screen has a checkbox "Preview Only". This allows operators to try out the program without doing any deletion. Note that if this box is not checked real non-recoverable deletions will occur.

## How it works

### Deleting Tax Return data

Clear Taxpayer Data looks for TaxWise installations on the computer upon which it is running. TaxWise installations are recognized by having a folder of the form \UTSyy\ in the root of a local or removable drive. The software asks the operator if each of the TaxWise installations that it has found should have their taxpayer data deleted. Once the operator has given permissions, the selected TaxWise installations are processed.

First the TaxWise database in the installation is analyzed and the operator is presented with a preview list of returns that have not been accepted by the IRS. This is a precaution in case there is a desire to save any of these returns. Note that any returns that have been accepted by the IRS will not be listed, but nevertheless will subsequently be deleted. Once this preview step has been completed, all TaxWise users are processed except for the Training user, which is left untouched. Each processed TaxWise user has all files containing taxpayer data deleted in a non recoverable fashion. The TaxWise user setup data is saved. This saved data includes information such as tax form defaults, print file settings, registration and EFIN information, and information about the last user session.

Then the TaxWise database content is irrecoverably deleted since the database contains taxpayer information. When TaxWise is run after the Clear Taxpayer Data program has finished it will automatically create a new database containing no taxpayer data.

# Clear Taxpayer Data

(Replacement for **TPClear**)

## Deleting Backed-up returns

The software finds all the drives on the system and asks the operator which ones should be processed. It then examines all non-hidden, non-system folders on each drive attached to the system looking for TaxWise backup files. The list of files to be deleted is presented to the operator to allow the operator to make sure that no inappropriate deletions will take place. Once the operator has accepted the list, all backup files on that list are irrecoverably deleted.

## Keeping Data that would otherwise be deleted

When the operator reviews the preview screens, either returns or backup files that should be kept may be seen. If this is true, note the names and exit the Clear Taxpayer Data program. Backup those returns to a flash drive or copy the backup files to a flash drive. Remove the flash drive from the system and restart the Clear Taxpayer Data program. **NOTE:** only such things as returns or backup files done for training, sample returns done for tax law investigation, or personal returns should be kept. The AARP Tax-Aide program and the IRS require deletion of all taxpayer data from computers at the end of the tax season.

**Help is available.** When you have questions about the information contained in this manual or need assistance in using these tools, please turn first to your AARP Tax-Aide district or state-level technology leaders for assistance. If you still have unanswered questions or problems after doing so, send an email asking your question or describing your problem to the National Technology Committee and the National Technology Office at [TaxAideTech@aarp.org](mailto:TaxAideTech@aarp.org). Please cc your state Technology Specialist on your email. Alternatively, you may ask your questions in the T-VOG forum.

## Technical data

The file extensions for the user setup file types that are saved under the TaxWise user folders are:

"pfl", "uhl", "000", "ini", "xml", "pfd", "prt", "pfu", "dat", "frm"

All other files are deleted.

The database and related folders that have their data cleared are:

ACK, CASHWISE, EMAIL, EXPORT, IMPORT, MAILBOX, PROFORMA, SPOOLER, TRANSMIT, DATABASE\BACKUP, DATABASE\nOTES, DATABASE\\*.CDX, DATABASE\\*.DBF, DATABASE\\*.IX, and some DATABASE\\*.DAT

The file names that are used when searching for backup files are:

"backup.001", "backup.lzh", "backup.opt", "backup.end"