

March 11, 2009

To: CyberTax members

From: David Alexander, Business Process Specialist, AARP Tax-Aide

Subject: CyberTax 2009-22: TaxWise Minor Update 23.11 and Avoiding Direct Deposit Errors

TaxWise Minor update 23.11:

TaxWise **Minor** update 23.11 has been posted to the TaxWise Support Website for download. Minor updates are not posted to the Electronic Filing Center. Volunteers who would like to download a minor update and do not have access to the Internet can request the minor update be posted to their TaxWise Mailbox by calling TaxWise Customer Support at 1-800-411-6391. Release notes attached.

This update does not impact VITA/TCE, including AARP Tax-Aide, sites using TaxWise. It provides a correction to TaxWise diagnostics for errors in bank applications only. This release does not need to be applied by AARP Tax-Aide sites.

Avoid Direct Deposit Errors:

The benefits of Direct Deposit are well documented, allowing for taxpayers to get their refunds quickly and directly. That's why if you choose to help your customers to Direct Deposit their refunds, it's important to keep this positive benefit from becoming a negative. Errors in entering Direct Deposit Account Numbers can cause real difficulty for taxpayers as they work with the IRS to try to sort out where the money went and how to get it back. Last year, AARP Tax-Aide had several time-consuming errors and we need to take steps to address the issue.

One way to encourage accurate entry is to discourage the use of the "Auto- Complete" feature. As publication 3189 instructs the box under Miscellaneous Options for "Enable Auto-complete for entries with a history list" should NOT be checked. This will require that Counselors re-key the routing and account numbers a second time and entries with a discrepancy will be picked up when diagnostics are run prior to creating the e-file.

Our best defense, however, is the second person Quality Review. Quality Review is as much about verifying important items like filing status, addresses on W-2s, and Social Security numbers as it is checking that entries are correct and tabulated accurately. Keep promoting good quality in all that you do.

Leaders, please share this information with volunteers who may not receive Cybertax.

***Release Notes Minor Update 2311.pdf are attached.

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