

January 27, 2009

To: Cybertax members

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

Subject: Cybertax 2009-07: TaxWise Information Major Update 23.06 scheduled for release

Major Update 23.06 is scheduled for release today, January 27, 2009. Included in this release are changes to the **Recovery Rebate Credit**. Effective with the download of version 23.06, the Recovery Rebate Credit will not be calculated with the filing of the tax return. Preparers must continue to complete worksheet #5 to compute the taxpayer's RRC, but \$0 will be reflected on line 70, Form 1040 (line 42 ,Form 1040A, line 9, Form 1040EZ) of the taxpayer's return. IRS will process the taxpayer's return without the RRC and will issue any amount due for RRC at a later date. Any amount, other than \$0 on line 70, Form 1040 (line 42 ,Form 1040A, line 9, Form 1040EZ) may result in the return being rejected.

Midwestern Disaster States - included in major update 23.06 are changes to the software that will allow the electronic filing of returns for taxpayers impacted by the Midwestern disasters who choose to use 2007 Earned Income for computation of applicable tax credits.

Updated TaxWise Reports - recent changes to IRC 7216 allow VITA/TCE preparers to use data from taxpayers returns for anonymous aggregate compilations without taxpayer's consent. Effective January 26, 2009 - TaxWise Online and Web Reports include all taxpayer data as it did prior to implementation of IRC 7216. Changes were made to the reports available in TaxWise desktop and posted to the Electronic Filing Center (EFC) last night, January 26, 2009 . Once the preparer connects to the EFC, these changes can be downloaded and applied.

Locked accounts - instructions for resolving locked password accounts were provided in the "Quick Reference Guide" included with delivery of TaxWise software. Additional information on unlocking accounts can be found in the TaxWise User Manuals. To unlock an ADMIN account, please send an email to two@cchsf.com. Do not call the support site, the assistants will not be able to help you.

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

**CyberTax messages will be available weekly on the Extranet (<http://www.aarp.org/tavolunteers>) in the "General Program Communication" section.

*** no attachment intended.

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