

February 6, 2009

To: Cybertax Members

From: Dorothy K. Howe, Assistant National Director, AARP Tax-Aide

Subject: Cybertax 2009-10: Tax Record Envelope and Survey (D12225, 908)

We have been hearing from volunteers that many of you are having difficulty using this year's tax record envelope with survey attached (D12225, 908). Although our specifications for printing the envelope allowed for ¼" glue on both sides, the glue is up to ½" or more on one or both sides on many, but not all, of the envelopes. We are very sorry that this has caused both frustration and extra work for those of you preparing taxes.

It is extremely important to use the envelope with the survey attached in order to obtain the data we need to report to our funders (including the IRS and AARP). Our funding each year is dependent on data that we obtain and report back to our funding sources. Without the data obtained from the survey, volunteers would have to ask questions of the taxpayers and report that data to us for our reports. Obtaining the information from the survey is our means of obtaining the needed information without burdening our volunteers unnecessarily.

We urge that you do not use envelopes from prior years or purchase envelopes to use instead of the tax record envelope and survey. AARP Tax-Aide does not have funding for and therefore cannot reimburse for any envelopes purchased to be used as a substitute for the tax record envelope plus survey.

We want to offer suggestions that some volunteers have made for using the existing envelope. We hope that you find some or all of these to be viable alternatives.

1. Be sure that you are only inserting papers that are essential to the tax return, such as a copy of the tax return itself and papers that the taxpayer brought, such as W2 forms. Consider not printing copies of TaxWise's main information page or W-2 summary which is not a formal part of the 1040 filing and is not required to be maintained. These extra pages not only add to the material to be fit into the envelope but also add unnecessary paper and toner costs to the program.
2. Slip your hand gently inside the envelope and spread it open before inserting papers. This must be done gently so as not to tear it on either or both sides. If it is torn, re-gluing with glue stick works.
3. Purchase rubber bands and fold it around the envelope and the taxpayer records when needed. We will reimburse for the cost of rubber bands.

Because the tax record envelope has been problematic whenever the survey is attached, we are researching alternative ways to get the survey to taxpayers without adding to the workload by asking volunteers that you give it to each taxpayer.

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

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\*\*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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