

February 10, 2009

To: CyberTax members

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

Subject: CyberTax 2009-11: Activity Reporting and 1099-B reminder

In this CyberTax are two issues, first on Activity Reporting and second a reminder on the delayed deadline for the 1099-B.

1. Activity Reporting:

The Activity Reporting system for the current tax filing system has now been turned on. To access the system, please go to the volunteer extranet at www.aarp.org/tavolunteers look under "Hot Topics" to find a link titled "Activity Reporting".

As a reminder, activity counts are due by site according to the following schedule:

1. From the beginning of the season to the last day in February (2/28/2009): counts due in the system by midnight, March 5, 2009
2. From March 1 through March 31 (3/1-3/31/2009): counts due in the system by midnight, April 5, 2009
3. From April 1 through the end of the regular tax filing season (4/1 - 4/15/2009): counts due in the system by midnight, April 26, 2009.

An online presentation and training is available for volunteers needing to access the system. A link exists under "Hot Topics" to bring you to the training materials posted on the extranet. This link is titled "Forgot How to Submit Activity Counts?".

2. Delayed deadline for 1099-B:

A new law, enacted last fall, changed the deadline from Jan. 31 to Feb. 15, when brokers, including brokerage firms, mutual fund companies and barter exchanges, must furnish year-end Forms 1099-B to their customers. Although 1099-B's are generally reserved for brokered transactions, some brokerage firms also use the 1099-B to file a "consolidated statement" that includes other activities including interest and dividends. Obviously this is an important issue for those sites that work certain Schedule D transactions and Counselors should be cognizant that taxpayers may not have all of their paperwork yet.

Thank 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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