

Internal Revenue Service – SPEC Cincinnati Territory FILING SEASON UPDATE

Important Dates for e-Filing

Please keep the following dates in mind as we prepare to end the filing season:

- April 15 Last day to e-file timely returns
- April 15 Last day to e-file timely extension requests
- April 20 Last day to retransmit rejected timely filed returns and extensions**
- October 15 Last day to e-file returns that received 6-month extension
- October 20 Last day to retransmit rejected late or extension returns

TaxWise sent the following message today:

In order to timely file your state returns between now and April 15, we recommend that you unlink state returns from the federal return before you transmit the federal.

In TaxWise, when you create the e-file, choose to unlink the state from the federal.

For more information on linked and unlinked state returns, see the program help in your tax software.

Deadline for Requesting a 2009 Refund

Not only is April 15 the due date for 2012 Forms 1040, it is also the last date that 2009 forms can be filed to request a refund. See [IR-2013-29](#) for more information. There is an estimated \$9,552,000 in refunds for Kentucky taxpayers and an estimated \$26,714,000 for Ohio taxpayers... and that does not include the EITC and other credits!

If your site has been with the VITA/TCE program since at least 2010 and used TaxWise Desktop, you should have received the 2009 end of the year CD in June 2010. If your site used TaxWise Online in 2010, then you still have access via twonline.taxwise.com/09.

We realize that some VITA/TCE partners and sites have placed a special emphasis on preparing 2009 returns over the past month. Thank you for all of your efforts!

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Closing Your Site for the Season

Filing season 2013 is nearly over! As you close your site until filing season 2014, please remember the following:

- Ensure that all returns have been filed and all rejects have been resolved
- Let your IRS-SPEC Relationship Manager know if your site will continue preparing returns in the post filing season
- Securely retain records as necessary per page 21 ([PDF page 28](#)) of [Publication 3189](#), *Volunteer e-file Administration Guide*
- Shred any documents and delete electronic records that are no longer needed per page 8 ([PDF page 10](#)) of [Publication 4299](#) (while complying with any applicable record retention guidelines)
- Follow the other procedures on pages 32 and 35 (PDF pages [34](#) and [37](#), respectively) of [Publication 1084](#), *Site Coordinator's Handbook*
- If your site uses TaxWise Online, refer to the procedures on page 57 ([PDF page 68](#)) of [Publication 3189](#)
- If your site uses TaxWise Desktop, refer to the procedures beginning on page 95 ([PDF page 109](#)) of [Publication 3189](#)
- Let your relationship manager know of any recommendations that you have regarding TaxWise, IRS-SPEC products, and/or IRS-SPEC requirements
- Celebrate a successful filing season!