AARP TAX-AIDE INTAKE PACKET
INSTRUCTIONS

General guidelines

The safety and health of all Tax Aide volunteers and taxpayers is critical.
Tax return preparation will only be provided to those taxpayers who are willing to abide by these guidelines:

- All tax preparation will be done via appointments only.
- Walk-in service will not be provided due to COVID-19.
- Masks must be worn by anyone entering the Community Room for tax preparation services.
- Social distancing must be maintained at all times.
- Taxpayers will not be allowed to remain in the Community Room while the returns are prepared.
- Taxpayers must have a cell phone available to communicate with the tax return preparer.
- **Taxpayers must bring their own pen to complete and sign documents**
- Taxpayers must not leave the parking area or the library without their tax documents.

What you can do before the appointment

- Pick up the AARP Tax Aide Intake Packet from the library main desk or rack.
- Complete the questions on the back of these instructions
- Complete the Intake/interview Form 13614-C**.** The three signatures are optional.
- Complete the Virtual VITA/TCE Taxpayer Consent Form. This form requires a signature.
- If these forms are not completed in advance, they must be completed in the parking area or library prior to being assigned to a tax counselor..

What will happen at your appointment

- When you arrive for your appointment. check-in at the Community Room, the separate entrance on the right of the library.
- Upon check-in, you will be assigned to a tax counselor for an interview. If social security cards are required for identification, they will be copied.
- Your tax documents will be inventoried and a Drop-Off Document Inventory Checklist will be prepared. A tax counselor who will conduct an interview for preparation of your federal and state returns. Your social security cards and photo ID will be returned to you.
- You will be asked to return to the parking lot or the library during tax return preparation.
- You may be contacted with questions at the cell phone number you provided on the intake/interview form.
- After the return is completed, it will be quality reviewed by another tax counselor and printed.
- You will then be called by cell phone to return to the library to complete your tax return.
- Your tax documents will be inventoried with the Drop-Off Document Inventory Checklist. The tax counselor will review the return with you. If satisfied with the return, you will sign Form 8879 to allow us to electronically file the returns.
- All return preparation documents will be returned to the taxpayer. No documents will be retained by the AARP Tax-Aide staff.
- If the return cannot be completed by the end of the shift, the taxpayer documents will be returned to the taxpayer and an appointment will be made to complete the return.

Checklist of things to bring with you:

- Proof of identification (photo ID)
- Social Security cards for you, your spouse, and dependents
  OR Last year's return prepared by AARP or VITA
  OR Any correspondence from Social Security with only the last four digits of SSN
  OR ITINs with an IRS issued letter or card
- Birth dates for you, your spouse and dependents
- Wages and earnings, pensions or other retirement income statements (Forms W-2, W-2G,1099-R, 1099-Misc, 1099-NEC, 1099-K, 1099-G, K-1, SSA-1099) from all employers and payers
- Interest and dividend statements (Forms 1099-INT and 1099-DIV)
- Consolidated 1099 document from brokerage accounts
- Total paid to a daycare provider and the provider's EIN or SSN
- Affordable Health Care Statement Form 1095-A
- Education expenses on 1098-T
- Student loan interest paid on 1098-E
- Last year's tax return 2020
- If you expect to receive Earned Income Tax Credit (EITC) and your income was higher in 2019, bring a copy of your 2019 tax return.
- A blank check with VOID written on the face to be used to for direct deposit of your refund of to pay for taxes owed. If it is shown on last year's return include a note to use it for this year

All documents must be in paper. Cell phones cannot be use to display forms.

Economic Impact Payments (EIP3)

Amount of third EIP received from Notice 1044-C or letter 6475 or your records ____________

Charitable deductions

If you are taking the standard deduction, up to $300 of cash contributions ($600 for MFJ) to charity can be deducted.

Amount of cash contributions to charity ___________

Advanced Child Tax Credit Payments

Amount of advanced child tax payments received from letter 6419 or your records ________