

SITE QUESTIONNAIRE

WHICH TAX YEAR RETURN(S) ARE NEEDED – check all that apply

- ☐ 2020 (current year)
- ☐ 2019
- ☐ 2018
- ☐ 2017

SITE QUESTIONS

1. Was taxpayer's 2019 or 2018 tax return prepared at this VITA site?
 - ☐ Yes
 - ☐ No
2. Has taxpayer ever referred someone to this site?
 - ☐ Yes
 - ☐ No

LANGUAGE INTERPRETER NEEDS

- ☐ I WILL require a Spanish/English language interpreter when discussing taxes
- ☐ I WILL NOT require a Spanish/English language interpreter when discussing taxes

The most efficient way for us to review your return with you remotely, and still allow you to see the return before we file it, is through VIDEO CONFERENCING. To do this, we use a platform called "ZOOM" which is internet based. Please answer the following questions to help us assess whether or not you are able to "ZOOM" with us.

TECHNOLOGY

- ☐ Windows or Mac computer/laptop
- ☐ iPad or Windows tablet
- ☐ iPhone or Android smart phone
- ☐ I do not have access to a computer or smart device

INTERNET ACCESS

- ☐ I DO have a reliable internet connection
- ☐ I DO NOT have access to the internet

FAMILIARITY

- ☐ I have a ZOOM account/I have used ZOOM for virtual meetings/gatherings
- ☐ I have not used ZOOM, but I am familiar with/have used other virtual meeting platforms
- ☐ I have never used ZOOM or any other virtual meeting platform
- ☐ N/A - I don't have access to a smart device

CONTACT INFO (please print legibly)

Name _____

Home Phone # _____

Mobile Phone # _____

Best Days/Times to call _____

Email Address _____

The Key Word or Phrase is a security measure to help protect your identity. This can be any word or phrase YOU choose. Note: When you receive a call from VITA personnel about your tax information, they will ALWAYS provide your personal word or phrase to you so you know the call is legitimate. **Do not provide any personal information until you hear your personal key word or phrase.**

Your Personal Key Word or Phrase: _____
