

## **TAX SITE DROP-OFF INSTRUCTIONS**

Reinvestment Partner's Tax Site at 110 E Geer Street is operating as a Drop-Off Site only from January 24, 2022 through April 1, 2022. Please note the following instructions:

### **STEP 1**

Pick up or Download your intake form (Form 13614-C), Virtual Consent Form (Form 14446), and Technology Checklist.

Fill out completely and place them in a large envelope along with your W2s, 1099s and other pertinent 2020 tax documents. Additionally, gather a copy of your 2020 return, your Photo ID, Social Security cards, and direct deposit information to bring with your current return documents (To save time, you can include copies of ID, SS Card and deposit info in your envelope.) The VITA Site staff WILL NOT begin processing your return without these required forms and ID documents.

### **STEP 2**

Drop off your return at our Geer Street Site during our window hours:

Mon, Weds, Thurs 10AM to 4PM • Tues 10AM to 6PM • Fri 12PM to 4PM

Allow us to make a copy of your ID, SS Cards and Direct deposit information if you haven't already done so. Make sure we have an accurate phone number and email address on your technology form so that we may contact you regarding your return and to conduct your review. Based on your technology capabilities, we will schedule either a phone or video conference quality review.

### **STEP 3**

Participate in the verbal or video quality review of your tax return to ensure accuracy. After you are satisfied that it is correct, be sure to email us a note with the last 4 digits of your SS# giving us express permission to E-File your return.

### **STEP 4**

Return to the site to pick up a copy of your completed return and related tax documents. Please hold on to these documents for at least three (3) years for your records.

\*\* In response to COVID-19 revised guidelines, your return will be prepared/reviewed by certified volunteers at an alternate location.

## **REQUIRED PAPERWORK**

**PLEASE MAKE SURE THESE FORMS ARE COMPLETED AND INCLUDED IN YOUR ENVELOPE**

- FORM 13614-C - Intake/Interview & Quality Review Sheet**
- FORM 14446 - Virtual VITA/TCE Taxpayer Consent**
- Technology Checklist**

## **RETURNS THAT WE CANNOT PREPARE**

Please be aware that there are certain returns that the IRS does not allow us to prepare. These are returns that contain “Out-of-Scope” items or are more complex than we can handle given the volume of our activity and the need to assist as many taxpayers as possible. While the list of Out-of-Scope items is extensive, the primary Out-of-Scope items that would prevent us from preparing your return are:

- You have income from property that you rented to someone else.
- You have income from the sale of property other than your personal residence.
- You have certain kinds of income reported on a tax form that is a “Schedule K-1” from a partnership, trust, or estate. For example, ordinary income or loss reported in box 1 of this form is Out of Scope. Investment income (interest, dividends, and capital gain) reported on a K-1 is generally in scope.
- You have income that would be reported on a Schedule C (self-employment or business income) and after deducting your expenses, the Schedule C would show a net loss (your expenses related to the activity are more than the income).
- You conduct a complex business that you report on a Schedule C. We can do Schedule C's that involve simple operations like reporting the income of a service provider who is not an employee, but we are not able to do more complicated Schedule C's that involve sales, substantial costs (like inventory, substantial supplies), substantial bookkeeping, etc. These returns must be done by a paid preparer.
- You contributed property (such as clothing and furniture) other than cash to a charity and you want to claim that the value of the property is more than \$500.
- You have one or more complicated brokerage statements with complex items such as accrued interest, bond premium, etc. We can do simple brokerage statements but will not be able to accommodate returns with a significant number of brokerage statements or overly complex brokerage statements.

Please inform the person with whom you are dropping off your documents if you believe you might have one of these situations so that we can make an assessment as to whether we will be able to do your return