**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 library for tax preparation services.
* Social distancing must be maintained at all times.
* Taxpayers will not be allowed to remain in the Story 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 without their tax documents.

### ****What you can do before the appointment:****

### **Pick up the AARP Tax-Aide Intake Packet from the Bull Run Library entrance.**

### **Complete the questions on the second page of this document.**

### **Complete the** Intake/interview Form 13614-C. This form requires three signatures.

### **Complete Virtual VITA/TCE Taxpayer Consent Form. This form requires a signature.**

### **The return cannot be started until these forms are signed**.****

### **If these forms are not completed in advance, they must be completed in the parking area.**

### ****What will happen at your appointment:****

### **You will access the taxpayer intake area from the emergency entrance on the side of the building. There will be signs directing you where to go.**

* When you arrive for your appointment, call 571-306-0284 to announce your arrival.
* Remain in the parking lot until you are called to enter.
* Upon check in, your tax documents will be placed in an AARP Tax-Aide envelope and given to a tax counselor for preparation of your federal and state returns. Your identification documents will be returned to you.
* Taxpayers will be asked to return to their vehicles during tax return preparation.
* You will be contacted with questions at the cell phone number provided on the intake/interview form.
* After the return is completed, it will be quality-reviewed by another tax counselor and printed.
* A tax counselor will review the return with the taxpayer and answer any questions over the phone.
* The taxpayer will then be asked to return to the library to receive their tax return package.
* If satisfied with the return, the taxpayer will sign Form 8879 to allow AARP to electronically file the returns.
* All return preparation documents will be returned to the client. 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 returns 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)
* Brokerage statements
* 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
* 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 used to display forms.

**Economic Impact Payments (EIPs) Worksheet**

Amount of firstEIP received: \_\_\_\_\_\_\_\_\_\_\_\_

Amount of second EIP received: \_\_\_\_\_\_\_\_\_\_\_\_

**Charitable deductions**

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

Amount of cash contributions to charity: \_\_\_\_\_\_\_\_\_\_\_