

## **WHO PROVIDES THIS FREE SERVICE?**

The United Way of Hunterdon County is pleased to offer the IRS Volunteer Income Tax Assistance (VITA) program for free basic tax return preparation to qualified individuals. While the IRS manages the VITA program, UWHC is an IRS partner staffed by volunteers who want to make a difference in Hunterdon County. All VITA volunteers who prepare returns must take and pass tax law training that meets or exceeds IRS standards. This training includes maintaining the privacy and confidentiality of all taxpayer information. In addition to requiring volunteers to certify their knowledge of the tax laws, the IRS requires a quality review check for every return prepared at a VITA site prior to filing. Each filing season, UWHC volunteers prepare hundreds of federal and state returns.

## **ABOUT THIS PACKET**

This packet contains forms, checklists and instructions related to your tax filing. Please read the instructions thoroughly, complete all forms and follow all steps prior to your intake appointment.

## **BEFORE YOUR VISIT**

1. You must schedule an appointment for this service in advance by calling 908-237-1689.
2. Review the documents contained in this **INTAKE PACKET**. Read the instructions, complete the forms prior to your appointment, and ensure you have all the required documents and information our volunteers need to help you. (See the **WHAT TO BRING** list in the packet).
3. Place all completed forms in the envelope, complete the personal information on the envelope label and bring the packet to your intake appointment.

**IT IS IMPORTANT THAT YOU COMPLETE ALL DOCUMENTATION PRIOR TO YOUR ARRIVAL, AND YOU MUST ENSURE YOU BRING ALL TAX DOCUMENTATION WITH YOU TO THE APPOINTMENT. FAILURE TO DO SO MAY RESULT IN A DELAY IN YOUR TAX PREPARATION.**

## **NOTICE TO JOINT FILERS**

The tax preparer is required to visually verify those signing the tax documents prior to filing. However, one filer may meet with the preparer to review the documentation and discuss the return, so long as the individual provides copies of the joint filer's proof of identification (photo ID) and social security card at the intake session. Ensure that both taxpayers have signed all paperwork prior to the appointment. Finally, both taxpayers **MUST** be present in-person and/or by video conference at the finalization session.

QUESTIONS? [taxes@uwhunterdon.org](mailto:taxes@uwhunterdon.org) or (908) 237-1689

**REQUIRED FORMS AND DOCUMENTATION**

In order to take advantage of the VITA program, the IRS requires certain documentation to be completed by the tax filer. Failure to complete the required documentation may result in our volunteers being unable to prepare your tax return.

**Required documentation:**

1. **Form 13614-C Intake/Interview & Quality Review Sheet** All information on pages 1 – 3 must be completed prior to your intake session. If you don't know the answers to some questions, please leave them blank, and they can be completed with your tax preparer.
  - **NOTE:** Page 4 contains **Form 15080 (EN-SP) Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites**. Your consent authorizes your 2021 tax data to be available at any VITA site that uses the IRS software for filing your return when you file your 2022 returns next year. Your consent provides the flexibility for you to use VITA services through other IRS partner location in the future. **YOU ARE NOT REQUIRED TO GIVE CONSENT, but providing consent gives you the flexibility to have your taxes prepared at a different VITA site in 2023.**
2. **Form 14446 Virtual VITA/TCE Taxpayer Consent** [ONLY FOR SCAN AND GO] You are required to complete Part III. First is the IRS request to review your return for accuracy question. By indicating YES, your return may be randomly selected by the IRS for a quality review. By selecting NO, you are still eligible for VITA services. Second is the Virtual Consent Disclosure, for this season, you must select YES in order for us to provide preparation service because we cannot provide complete in-person services due to the pandemic. Please sign/return this form in order to have VITA services. **YOUR CONSENT ALLOWS US TO PREPARE YOUR TAX RETURN VIRTUALLY, AND YOU AGREE IN ADVANCE TO THIS PROCESS.**
3. **UWHC VITA Consent to Use/Disclose** Your consent allows UWHC to contact you via mail, email, or phone about next year's VITA program and other UWHC services. You also agree to allow UWHC to use your tax return for collective statistical analysis and reporting while ensuring no personally identifiable data is released. **YOU ARE NOT REQUIRED TO GIVE CONSENT, but your consent helps us ensure we can continue to fund the program and send you a reminder to make your tax appointment.**
4. **State Tax Return ADDITIONAL INFORMATION** This information is required to accurately complete your New Jersey and/or PA return and must be completed prior to your tax filing. UWHC volunteers have received training to help you with NJ and PA State tax filing. We also have specific volunteers that can assist with other state returns.
5. **Additional UWHC Questions** Please answer the required questions to help us determine what software system to put your return in and to ensure you have received the proper stimulus and child tax credit (CTC) payments. If you have not received a stimulus or CTC payment, we can help secure them as a credit on this tax return.
6. **Client Intake Survey Form** All information from this form will be kept confidential, except for reporting purposes for United Way of Hunterdon County. Reports will never contain personal information.

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