

VITA PROGRAM CLIENT INFORMATION

Instructions

1. **Place the following items in the envelope:**

- All tax documents (Remove documents from envelopes and remove staples)
- Photo ID for taxpayer (and spouse)
- Social Security card(s) for everyone on the tax return (or forms SSA-1099's suffice)
- Voided check / account information for direct deposit (must be in taxpayer(s) name).**
If you don't have a bank account check our list of other options for direct deposit. *More info below
- All three (3) completed Intake forms:
 1. 13614-C IRS Intake/Interview & Quality Review Sheet
 2. 14446 IRS Virtual VITA Consent form (complete page 3)
 3. Local Intake form (page 2 of this document)

2. **Bring the envelope for your intake interview appointment.**

- We will review your intake forms and documents & ask questions to clarify & make notes.
- We will scan everything and save it on a USB drive, then upload the file(s).
- The envelope, all documents and the USB drive will be returned to you.
- We will schedule a Final Review appointment or if volunteers are available you can wait.

What happens next

- **Preparation-** A certified volunteer, onsite or remote, will prepare your return and ask or call with questions.
- **Additional documents** must ONLY be sent in the Customer Portal (click/tap "My files" to upload) or brought in person with photo ID. Never email or text tax documents and **do not leave them in our overnight drop.**
- **Final Review is required-** We will provide a copy of your return and review it with you. If you set up your customer portal, you can review over the phone. Your return will be available in your portal for a few months.
- **Save a copy** of the tax return to your USB drive with the scanned documents.
- **E-File-** After the return is signed we will e-file. When the e-file is accepted, we delete your scanned documents.
- **Status of your return-** Check the status of your return in your portal or <https://www.irs.gov/wheres-my-refund>

Customer Portal - Instructions - TaxStatusNow email

The secure customer portal connects to your tax return and allows you to upload missing documents, send info in a secure message, e-sign the return and check the status of your return from a phone, tablet or computer. Download a complete User Guide on jcunitedway.org

1. **Check your email.** After your return is started, the email comes from "TaxStatusNow" - click/tap the link.
2. **Register your account.** Create your own username and password. The email address, phone #, last name and last four of your social security number **must match. It must match the primary taxpayer** on a joint tax return, so if it fails, try your spouse's information.
3. **Verify.** Choose text or email. **Keep the window open!** Check text/email to get the six-digit code and put it into the box in the open window. If you close the window, you will need a new code. Only the last code sent is valid.
4. **Bookmark the link to your portal** for easy access. You can also find the link on jcunitedway.org
5. **Questions?** Click "Messages" to contact us in your Secure Customer Portal.

***No Paper Checks** The IRS began phasing out paper checks in September, 2025. Refunds on returns without direct deposit information will be automatically frozen for 6 weeks and the IRS will send you a letter (CP53E notice) requesting banking information. It could take 3 months to get a paper check.

Taxpayers are responsible for the information on their tax return and sign under the penalty of perjury.

VITA PROGRAM LOCAL INTAKE FORM

	Taxpayer	Spouse
email address:	@	@
cell phone:		
As of 1/1/2025:	<input type="checkbox"/> Lived in Jennings Co. Or write in other county: <input type="checkbox"/> Worked in Jennings Co. Or write in other county:	<input type="checkbox"/> Lived in Jennings Co. Or write in other county: <input type="checkbox"/> Worked in Jennings Co. Or write in other county:

Did you rent or own your primary home in 2025?		
<input type="checkbox"/> OWNED <input type="checkbox"/> all 12 months or # of months: _____ Property tax paid in 2025: \$ _____	<input type="checkbox"/> RENTED <input type="checkbox"/> all 12 months or # of months: _____ Rent paid in 2025: \$ _____	Required for rent credit: Landlord: _____ Address: _____ City, State Zip: _____ <input type="checkbox"/> Check if dwelling is NOT subject to Indiana property tax.

HSA	<input type="checkbox"/> Single Plan <input type="checkbox"/> Family Plan	Total spent from HSA: <input type="checkbox"/> Total spent is 100% medical	<input type="checkbox"/> Amount spent not qualified: <input type="checkbox"/> Additional Deposits:
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Retirement	<input type="checkbox"/> Taxpayer Distribution start date(s) _____ <input type="checkbox"/> I made after-tax contributions (date payouts started)	<input type="checkbox"/> Spouse Distribution start date(s) _____ <input type="checkbox"/> I made after-tax contributions (date payouts started)
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Military retirement	<input type="checkbox"/> Military retirement income and/or survivor's benefits Total Amount \$ _____	W2 w/ "Q" box 12 is Out of Scope
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Other	<input type="checkbox"/> Tips? (including tips not reported on a W2) <input type="checkbox"/> Overtime pay? <input type="checkbox"/> Purchase a new car in 2025?	<input type="checkbox"/> Parochial School or homeschool <input type="checkbox"/> Contributions to a 529 Plan
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Trump acct(s)	<input type="checkbox"/> Include Form 4547 for dependent(s) under 18 to open a Trump account(s) <input type="checkbox"/> Claim the \$1,000 Pilot Program Contribution for each eligible child* <small>*children born 2025-2028, qualifying child on this return, US. citizen with valid SSN.</small>
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Bank Info Direct deposit is needed for a refund. The IRS is discontinuing paper checks.

Account must be in the taxpayer's name. No bank account? Ask for our list of other options!

Cancelled check
(best option!)



-OR- complete this section. Print neatly- this information must be exact!

Name(s) on account _____
 Bank Name _____
 Routing# _____
 Account # _____

I certify the above account is in my name. _____ (Signature)

If I owe, I want to pay by direct debit on: _____ (date prior to April 15 - if left blank we use April 10)

Volunteer Initials: