VITA
VOLUNTEER INCOME TAX ASSISTANCE

Jennings County United Way
jcunitedway.org

LIVE UNITED
United Way

Revised 01/06/2022

VITA Client Information

INSTRUCTIONS– *Do NOT staple documents!*

1. **Remove all tax documents from envelopes, unfold and place inside the client envelope along with:**
   - ☐ Photo ID for taxpayer and spouse
   - ☐ Social security cards for everyone on the tax return
   - ☐ Voided check for direct deposit
   - ☐ Completed Intake paperwork:
     - 13614-C Intake/Interview & Quality Review Sheet
     - 14446 Virtual VITA Consent form
     - Local Intake information sheet
2. **Return with your envelope for your intake interview.**
   - We will review your intake forms and documents & questions to clarify your information
   - We will scan your forms and documents and upload the file, then all forms & documents will be returned to you along with a USB drive containing your scanned documents file.
   - **You will need to save your signed tax return to this USB drive after you sign it**
   - **Questions? Contact us in your Customer Portal! (Click "Messages")**
   - Ticket—if you call us this ticket number is a "PIN" used to confirm your identity over the phone.

3. Customer Portal Set up & Quality Review

1. **Set up your Secure Customer Portal!** The Portal is an easy, free and secure way to share files, messages and e-sign documents from a phone, tablet or computer. You can view and sign your tax return, as well as message us, or send us any files that may be missing from your documents.
   a. **Check your email.** The email is from "TaxStatusNow" once your return is started. Click/tap the link.
   b. **Register your account.** Create your own username and password. The email, phone #, Last name and last four of your social security number must match your tax return.
   c. **Verify.** Choose text or email. **Keep that window open.** Check text/ email to get the six-digit code that it sends, and **put that six digit code into the box in the still open window.** If you close the window, you will have to get a new code. Only the last code sent is valid.
   d. **Bookmark the link** for easy access. You can also find the link on jcunitedway.org
   e. Download a User Guide for the Customer Portal on jcunitedway.org for details and screen shots.
2. **Preparation-** A volunteer tax preparer working from home, will prepare your tax return in a few days. We will call you with any questions. Any files requested, must be sent ONLY in the Customer Portal! Files can be electronic files or photo taken with your phone. *(Click/tap "My files" to upload)*
3. **Quality Review-** Review is required. We will call you to review once your return is finished.
   a. You will view the return in your Customer Portal. (Click/tap "Preparer Files"). Ask questions.
   b. When you are ready, you will sign electronically in your Portal. *(Click/tap "Preparer Files", click/tap "Add signature", sign in the box & save. Then below, near where you "viewed" click/tap "Sign".)*
4. **Save the signed tax return to your USB drive.** Your return will be available in your portal for a few months, but the portal will reset around November and you will no longer have access to prior returns.
5. Once the taxpayer (and spouse) have e-signed the return we can e-file. When the e-file is accepted, we delete our copy of your scanned documents. You can check the status of your return in your portal.
6. **Questions? Contact us in your Customer Portal!** *(Click "Messages")*

Taxpayers are responsible for information provided to the IRS.

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Local Intake Information Sheet

PRINT CLEARLY- used in your tax return and for your Customer Portal account.		
Taxpayer email address:	@	
Spouse email address:	@	
Taxpayer cell phone:	( ) —	☐landline / home phone only
Spouse cell phone:	( ) —	☐landline / home phone only
Taxpayer as of 1/1/2022:	☐ **Lived** in Jennings County ☐ **Worked** in Jennings Co.	☐Other: ☐Other:
Spouse as of 1/1/2022:	☐ **Lived in** Jennings County ☐ **Worked** in Jennings Co.	☐Other: ☐Other:

Property tax paid in 2022:	**Rent** paid in 2022:	Landlord's Name & Address:
$	$	Name Address City, State Zip

☐**Indiana Automatic Taxpayer Refund (2022)** - claim the $200 Credit if all 3 apply:

☐*you did not qualify for the $125 ATR,* ***AND*** ☐ *received Social Security in 2022;* ***AND*** ☐ *were not claimed as a dependent by someone else.*

$200 Additional Refund 10/26/2022-Only those taxpayers who were eligible to receive the initial $125 Automatic Taxpayer Refund (ATR) received the additional $200 ATR (Sept/Oct 2022) as a tax refund payment (either by direct deposit or combined check). $125 Initial Refund–(May-Sept) Indiana residents that filed a 2020 tax return were eligible to receive $125. ($250 filing joint.) If banking information was provided on the 2021 tax return Direct Deposit was made between May-July. If no banking information was provided on your 2021 return a paper check was mailed between July-Sept.

Less Common: ☐Parochial School or homeschool ☐Contribute to a 529 Plan

Required Quality Review Best times to reach you:		Mon	Tues	Wed	Thurs	Fri	Sat
We will call you to review your return,	9a-12pm	☐	☐	☐	☐	☐	☐
which you will access in your customer portal.	12p-4 pm	☐	☐	☐	☐	☐	☐
☐Request a Zoom Meeting instead	Other:						

Direct Deposit Information- Checking account must be in the taxpayer's name

Include (do not staple!) a copy of a cancelled check **OR** routing and account numbers for Direct Deposit:

Routing#

Account #

I verify the above account information is in my name.

____

Signature

ONLY PRIOR YEAR returns (2021, 2020) need to complete the information below			
Economic Impact Payments (Stimulus $)	#1-$	#2-$	#3-$
Advanced Child Tax Payments- Amount of total payments rec'd during 2021:	$		
Can you document up to $300 ($600 Joint) of Charitable giving? If yes, amount :	$		