



**2023 Franciscan CDC
VITA Program
DROP-OFF PROCEDURE
2022 Tax Season**

Site	Site Address	Days & Hours Intake Packet <u>Pick up Only</u>	Drop-Off & Final return <u>Pick- up by Appointments Only</u>	Site Open & Close dates
Franciscan CDC VITA	239 Anderson Ave. Fairview NJ 07022	*Monday-Fridays: 3:00pm-6:00pm *Saturday: 10am-1pm	*Monday-Fridays: 3:00pm-6:00pm *Saturday: 10am-1pm	OPEN: February 1 st CLOSE: April 6, 7, 8 & 9 th

Expected turn-around time for Virtual VITA Online/ Drop Off Tax Preperation Service is 7-10 days

Steps to follow for using the VITA Drop-Off Service:

1. Intake Packet Pick Up – To be picked up from the VITA site during the above schedule. You may also download and print the packet online from our website <https://www.franciscancdc.org/vita-program.html>
2. **Intake Process-** Follow and complete the instructions in the packet, sign the required **CONSENT FORMS** and ensure you have **ALL YOUR REQUIRED DOCUMENTS** for your filing status. Enclose all documents and forms inside the pickup envelope if applicable and **CALL** to make your **DROP Off Appointment**. **APPOINTMENTS WILL NOT BE GIVEN IF YOU DO NOT HAVE ALL THE INFORMATION.**
3. **Drop-Off** the completed packet (including prior year's tax return) at the VITA site during the scheduled days and hours **by Appointment only**
4. Tax Preparation will be done remotely and the client will be contacted via phone **by their scheduled Appointment only**
5. Taxpayer will obtain a copy of the filed tax return at the VITA Site **by Appointment only**. Married filing joint tax returns- (husband and wife must be present during pick up appointment).
6. No children permitted during drop off/pick up appointments.

Please refer to our webpage for instructions and to download and print the “Intake Packet” if necessary.

VISIT: <https://www.franciscancdc.org/vita-program.html>

PLEASE ALLOCATE 2 TO 3 HOURS for the COMPLETION of your RETURN

Call for APPOINTMENT:

Monday-Thursday	10 AM- 7PM	201-870-1219	201-941-1000
Monday, Wednesday & Friday	4:00 PM -7 PM	201-870-0426	

* Subject to Day/Time change and additional/early closures due to unforeseen circumstances and without any prior notice.

To find Information on VITA Site Locations in other areas (Bergen/Hudson County), please visit <https://irs.treasury.gov/freetaxprep/>



FRANISCAN CDC Virtual VITA

Who Qualifies

- ◆ Income less than \$65,000
- ◆ Elderly /Seniors
- ◆ Disabled individuals
- ◆ College Students
- ◆ Active Duty & Veterans*
- ◆ First Responders*
- ◆ Teachers*

* No income limit restriction

Free Online or Drop-Off Income Tax Preparation & E-file Service

Required Information:

- ◆ **MUST BRING** - Photo identification for the taxpayer and the spouse
- ◆ **MUST BRING** - Social Security Cards or ITIN card/letter for **ALL** members of the household to be claimed on the return.
- ◆ **MUST BRING** – Last year’s Tax Return- **NEW CLIENTS ONLY**
- ◆ Proof of Income, 1099R (pension/annuity), 1099 Misc. (for contractual jobs, self-employed; expenses totaled up by categories), 1099 SSA (Social security benefits statement), 1099 INT, 1099 DIV, 1099 K (ride-share service), cash tips, or any other kind of income
- ◆ If itemizing costs of all medical expenses (added up), Mortgage interest statement, Vehicle registration and charitable contributions (Less than \$500 for non-cash donations)
- ◆ Form 1098T (Tuition statement plus other education expenses e.g books, supplies, computer etc.) for claiming education credits
- ◆ Form 1095A, if health insurance was bought from Marketplace
- ◆ Child care expenses and provider's information including EIN/SSN, name and address, Cash payments required notarized letter.
- ◆ **Bank Routing number** and **Account number** for direct deposit / debit
- ◆ If filing a joint return, **Taxpayer & Spouse MUST** be present during the final review and for signing the return or a Power of Attorney to sign the tax return (on behalf of the missing spouse) should be provided

For Online Service:

MUST HAVE:

Email Address AND
 Computer, scanner with internet access OR
 Smart device with internet access (tablet or smart phone and ability to upload and take CLEAR images of documents)

For On-Site Drop-off / Pick Up Service (Appointment Only):

- * Must bring own & wear a mask
- * Bring your own pens please
- * Only the Taxpayer & Spouse are permitted to be present
- * **No children permitted**

Tax Preparation service will be provided by IRS certified volunteers by **Appointment Only**

Please refer to our web page for instructions and downloading 'Intake Packet'

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