



## FCDC TAX YEAR 2021 VITA Drop-Off Service Instructions

*Please follow ALL the instructions and complete ALL the steps. Failure to complete WILL may result in a delay of processing your tax return.*

### **A. Please complete the IRS form 13614-C, Intake/Interview & Quality Review Sheet**

Page 1 - Answer ALL questions (QI-II). **MUST provide an accurate phone number and email address.** Only the dependents (who you are claiming on your tax return) information is needed in Part II - #2 (Household information)

Page 2 - Must Check EACH box individually - Yes/No

Page 3 - Answer ALL questions 1-14. Write down your bank name, if it is checking or savings account, Routing number and Account number in the 'Additional Comments' section. You may also use this section (or an additional page) for any other additional information you may want to provide for your tax preparation

### **B. Taxpayer and Spouse (if applicable) must sign the additional 3 Consent Forms & the Survey Form**

Consent to Use Tax Return Information - NO PERSONAL INFORMATION WILL BE USED

Consent to Disclose Tax Return Information - NO PERSONAL INFORMATION WILL BE DISCLOSED.

IRS Form 14446 - Virtual VITA/TCE Taxpayer Consent - Required to use the Drop-Off Service

Consents to Use and Disclose are printed front and back of the sheet and your approval for both is important for the VITA program. Your approval helps us to continue this program every year. We will never Use or Disclose any Personally Identifiable Information or your individual refund amount.

### **C. Gather ALL the documents required to prepare your return including:**

#### **a. PRIOR YEAR'S TAX RETURN**

b. Copy of Social Security Cards or ITIN card(s)/letter for EVERYONE on the tax return

### **PLEASE REFER TO THE CHECK-OFF LIST FOR ALL DOCUMENTS REQUIRED**

### **D. Put ALL the completely filled out Intake Form, Consent Forms and required documents in the envelope provided and Drop-Off (by appointment) at the Franciscan CDC, 239 Anderson Ave, Fairview .**

You will be required to return on a later date to the same site to sign the completed return. Our volunteers will schedule an appointment with you for the same via phone/email. Please note that both, the Taxpayer & the Spouse (if applicable) MUST be present to sign the return. We will contact you by phone, if you don't answer at first, we will try within 15 minutes. Should you fail to answer both calls, you will be placed back into rotation at the end of the list.

### **E. At the time of Tax Return signature and Pick-Up appointment:**

a. Please wear your own mask and bring your own pens

b. ONLY the Taxpayer and Spouse should be present for the signing appointment

c. NO children allowed at pick-up