



Teton Valley VITA is a free tax preparation and filing service for low to moderate income taxpayers in Teton Valley. The IRS's Volunteer Income Tax Assistance (VITA) program has been in existence for over 50 years and the VITA site in Teton Valley has been in existence for 6 years. TVVITA volunteer tax preparers are IRS-certified and all TVVITA services are free.

The process for filing your Federal and state income tax returns with TVVITA is outlined below. Our site uses a drop-off process. You drop your tax documents off at the intake interview, we prepare the return at one of our work sessions, and your tax documents and a copy of the completed return are returned to you when you sign the return and filing authorization.

Assemble your tax documents. The most common take documents are W-2 or 1099-NEC from your work; other 1099 forms from banks, retirement accounts, brokerage accounts, etc; and 1098 forms for such expenses as child care and college tuition. If you are self-employed, you will need to gather written documentation for your business expenses. Be sure all your documents are in before you schedule an intake interview.

Determine your eligibility. The VITA program is designed to serve low to moderate income taxpayers, the elderly, taxpayers who do not speak English well, and military personnel. Returns that have farm income, rental income, depreciation expenses, income from cryptocurrency transactions, complex capital gains, or deductions for home office expenses are out of scope for VITA programs. Self-employment that involves paying other employees is also out of scope. To check on your eligibility, email your questions to vita@tetonseniors.org.

Schedule an intake interview. Call our scheduling phone number, **208-557-4778**, email vita@tetonseniors.com or visit our website, <https://tetonseniors.org/vita> to schedule your intake interview.

Intake Interview. At this interview, you will complete Form 13614-C Intake Interview and Quality Review Sheet and an authorization form that allows us to prepare your return following the process outlined here. Then, a volunteer tax preparer will review your forms and the tax documents you've assembled to make sure we have all the information needed to prepare your return. You should bring a **government-issued photo ID, social security or ITIN verification** for you, your spouse, and all the dependents listed on the return, and your **bank routing and account numbers** for direct deposit. At the conclusion of your interview, you will sign Form 14446 on the back of this page.

Return Preparation. Our preparers work as a team at scheduled times during the week. After the return is prepared, each return receives a Quality Review by another preparer, who verifies that all information is entered accurately and responds to questions the initial preparer may have had. You may be contacted during this process if the preparers have questions. If this happens, the preparer will clearly identify him/herself as being from Teton Valley VITA and **will not ask for your social security number or TIN or ask you to send money**. Any email you receive about your return will have an vita@tetonseniors.org address. All tax documents are kept in a locked cabinet at the Site Coordinator's residence when not in use.

Schedule an appointment to sign the return. Once your return is finished, we will contact you to review your return and sign the Authorization to E-File form. If you are married filing jointly, both you and your spouse need to sign. Be sure to bring **bank routing and account numbers** for direct deposit.

This form is required when any part of the tax return preparation process is completed without in-person interaction between the taxpayer and the VITA/TCE volunteer. The site must explain to the taxpayer the process used to prepare the taxpayer's return. If applicable, volunteers must advise the taxpayer of the associated risk of transferring their data from one site location to another site.

Request to Review your Tax Return for Accuracy

To ensure you are receiving quality services and an accurately prepared tax return at the volunteer site, IRS employees randomly select free tax preparation sites for review. If errors are identified, the site will make the necessary corrections. IRS does not keep any personal information from your reviewed tax return and this allows them to rate our VITA/TCE return preparation programs for accurately prepared tax returns. If you do not wish to have your return included as part of the review process, it will not affect the services provided to you at this site. If the site preparing this return is selected, do you consent to having your return reviewed for accuracy, by an IRS employee? _____ Yes _____ No

Virtual Consent Disclosure

If you agree to have your tax return prepared and your tax documents handled in the above manner, your signature and/or agreement is required on this document. Signing this document means that you are agreeing to the procedures stated above for preparing a tax return for you. (If this is a Married Filing Joint return both spouses must sign and date this document.) If you chose not to sign this form, we may not be able to prepare your tax return using this process. Since we are preparing your tax return virtually, we have to secure your consent agreeing to this process. If you consent to use these non-IRS virtual systems to disclose or use your tax return information, Federal law may not protect your tax return information from further use or distribution in the event these systems are hacked or breached without our knowledge. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature. If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov. While the IRS is responsible for providing oversight requirements to Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs, these sites are operated by IRS sponsored partners who manage IRS site operations requirements and volunteer ethical standards. In addition, the locations of these sites may not be in or on federal property.

I am agreeing to use this site's Virtual VITA/TCE Process as described above. _____ Yes _____ No

Printed Name

Spouse Printed Name

Date of Birth

Last four digits of SSN

Spouse Date of Birth

Spouse Last 4 digits SSN

Date

Telephone

Date

Telephone

Email

Email

Signature

Spouse Signature