

Virtual Income Tax Preparation

1. SM fills out Form 13614-C Intake/ Interview and Quality Review Sheet
2. SM Signs Form 14446—Virtual Preparation consent form
3. SM sets up a TEAMS/Zoom mtg. with Jennifer Wood to verify information accuracy, identification and social security numbers
 - Valid ID cards for each tax payer (Driver's License, Military ID, or Idaho photo Identification card)
 - Social Security cards to verify SS #'s for dependents—these can be a photo of the cards for each dependent claimed
3. PFC establishes the IRS Taxslayer Portal and sends SM the link.
4. SM scans or takes a picture of tax documents) and uploads them in the cloud
4. PFC extracts the documents and prepares the return.
5. PFC schedules another video chat for SM to verify accuracy and electronically file the return
6. Time to completion, approx. 2 days.

Do you have business expenses? Be sure to list all income and expenses associated with the business.

Form 2106 Deduction for SMs who travel more than 100 miles one-way to drill. Be sure to calculate mileage, food, and lodging costs for the appointment.

Drop Off and Review

1. SM comes to bldg. 270 during a VITA weekend
 2. SM fills out Form 13614-C Intake/ Interview and Quality Review Sheet
 3. SM shows proof of ID and SS #'s to VITA Rep.
 - Valid ID cards for each tax payer (Driver's License, Military ID, or Idaho photo Identification card)
 - Social Security cards to verify SS #'s—these can be a photos of the cards for each dependent claimed
 4. VITA Volunteer establishes a Taxslayer Portal and scans tax documents to the portal.
 5. VITA Volunteer prepares the return.
 5. VITA Volunteer informs SM taxes are prepared and schedules a time for review and electronic filing via in person or virtually.
- ***The goal for VITA weekends is to have SMs complete the intake interview, upload documents, and have taxes completed by the end of drill weekend. ***

Get a jump start by prefilling out the Form 13614-C (www.irs.gov), gather all tax documents, and bring the documents to the VITA center during drill weekends (see dates) , bldg. 270.

Tax Filing is 100% free of charge whether you desire an in person tax prep service, drop off and review, or a Virtual tax appointment and preparation

In Person Tax Preparation

Make an appointment with the PFC for a face-to-face tax preparation and tax education appointment.

You choose the tax software and enter all personal and financial information. We will meet during an appointment and review the tax forms together for accuracy and electronically file.

IRS will begin accepting electronically filed tax returns on Jan. 29, 2024.

Be sure to have last year's AGI available to prove identification and driver's license numbers for each tax filer. Have your bank account information available for your refund or to debit the account for payment.

VITA Tax Preparation—Gowen Field

February 2-4

March 1-3

April 5-7

Friday, 1800-2100

Saturday 0600-1800

Sunday 0900-1200