

## *Client Intake Checklist*

A tax counselor will contact you to review all forms and tax materials required for the upcoming scanning appointment. The tax counselor will phone you using a standard phone number (617-675-4444). When you answer the call, please ask the tax counselor for the codeword (“Unicorn”). If they do not provide the codeword, hang up. All authorized Tax-Aide counselors will call on that phone number with that codeword and will announce themselves as Montgomery County Tax-Aide volunteers.

During the phone session the tax counselor will confirm with you all of the materials you are expected to bring to the upcoming scanning session scheduled for \_\_\_\_\_ <date> \_\_\_\_\_ at \_\_\_\_\_ <time> \_\_\_\_\_ AM/PM at the \_\_\_\_\_ < scanning facility name> \_\_\_\_\_. A separate sheet describing the location of the scanning facility is included.

1. Please collect all tax materials prior to the client intake meeting.
  - a. If you have materials for both 2019 and 2020, please separate those items.
  - b. The tax counselor will query you about each tax year separately.
2. Please locate all necessary identification materials. Those items are:
  - a. Picture ID(s) - for yourself (and your spouse, if filing jointly)
  - b. Social security card(s) - for yourself, your spouse, and any dependents you are claiming on your tax return
  - c. A copy of a check if you wish to provide direct deposit of any refunds or direct debit of any payments.
  - d. You will bring these identification materials (plus your tax materials) to your upcoming scanning session.
3. Collect the forms that you picked up or that we sent you:
  - a. Form 13614-C: we’ll have you fill out this form during the client intake session. We’ll also explain and have you sign the consent items attached to this form.
  - b. Form 14446: we’ll describe the tax process during the client intake session and have you sign the form. We’ll need this signature before we can scan in your tax materials.
4. Identify any changed life circumstances that might affect your tax return. For example:
  - a. Marriage or divorce
  - b. New child or other dependent
  - c. Increased medical expenses
  - d. Purchase/sale of house
  - e. Other circumstances not listed here



Tax Payer Name: \_\_\_\_\_

Tax Year \_\_\_\_\_

Number of Documents	Document
	<b>Identification</b>
	Social Security/TIN cards for Taxpayer (and Spouse and all dependents)
	Photo IDs for Taxpayer (and Spouse)
	Power of Attorney
	<b>General Documents</b>
1	Form 13614-C Intake/Interview & Quality Review – completed including authorization signatures if appropriate
1	Virtual Consent Form 14446
	Prior year tax return
	W-2 (*see tip income below)
	1098-T (Scholarships - *see educational expenses below)
	1099-INT not included in brokerage statement
	1099-DIV not included in brokerage statement
	Form 1099G Refund of state and local taxes
	1099-MISC
	1099-NEC Income from self-employment
	1099-B, 1099-S (Brokerage statements, capital gains)
	1099-R (Pension, annuity, disability)
	1099-G Unemployment
	SSA-1099-R (Social Security) and RRB-1099 (Railroad)
	Receipts for child or dependent care expenses
	1098-E Student Loan Interest
	5498-SA, 1099-SA (Health Savings Account Forms)
	1095-A (Marketplace Health Plan)
	1099-C (Cancellation of Debt)
	1099-K Income from third party network such as Uber, Lyft
	<b>Document Written by tax payer that includes information below if applicable</b>
	Tip Income
	Alimony income or payments; date of divorce
	Income, including self-employment, not reported on 1099-MISC, 1099-NEC
	Income (or loss) from rental property
	Other income such as gambling, lottery, prizes, awards, etc. (including W2-G)
	Contributions to IRA
	Amount of supplies used by teacher
	Estimated tax payments made: IRS date and amount MD Comptroller date and amount
	Capital Loss Carryover from last year
	Amount of first EIP received, amount of second EIP received

	AARP Education Credits worksheet
	Educational expenses (list of expenses)
	Educational savings (529 funding, 1099-Q)
	Gambling Losses
	<b>Self-Employed</b>
	AARP Self-Employed worksheet
	AARP Self-Employed Covid-19 Tax Provisions
	Written list of expenses including documents from Uber, Lyft if appropriate
	Total business mileage, total commuting mileage (from home to first stop, last stop to home)
	Did you lose work days because of COVID? How many?
	Do you want to defer payment of your self-employment tax?
	<b>Itemized Deductions – Document written by tax payer to include information below if applicable</b>
	AARP Itemized deductions worksheet
	Health care expenses totaled by category, including insurance
	Mortgage interest Form 1098
	Real Estate Taxes paid (include bill)
	<b>Charitable contributions</b>
	Total Cash contribution (cash or check)
	Total Non-cash contributions less than \$500
	For each non-cash contribution over \$500: Name and address of donor organization Description and condition of donated property Date of the contribution Date acquired by donor How acquired by donor Donor cost basis or adjusted basis Fair market value Method used to determine fair market value
	<b>Other Forms and Information</b>
	Voided Check - Proof of bank account routing and account numbers

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Client's signature acknowledging return of all ID and tax documents

### MARYLAND TAXPAYER CHECKLIST (TY 2020)

In addition to completing the federal intake and interview form provided it is suggested that the TAXPAYER review this questionnaire and indicate any items to which the answer is yes. The items on this list are unique to MD and will not be highlighted during the federal return. (Subtraction or credit codes)

Yes	No	Did/was the taxpayer?
		A part Year Maryland Resident?
		Contribute to a MD Prepaid College Trust?/ Investment Plan (xa/xb)
		Act as a living Organ Donor (ss)
		Volunteer for charity that provides medical, health or nutritional care or assistance for handicap students at community college and have unreimbursed mileage expenses? (q)
		Pay real estate taxes and qualify for the Homeowners Tax Credit?
		Rent a house or apartment and qualify for the Renters Tax Credit?
		Qualify for elderly or retired military property tax credit (Owner who is ret mil or >40 yrs occupancy and > 65 years old)(county specific)
		Retired Fed or MD Public Safety worker age 55-64 (10b)
		Work as a teacher and have unreimbursed tuition expenses for maintaining teaching certification? Need B or higher (CR c)
		Pay Long Term Care insurance premiums (one-time credit) (CR e)
		Make Estimated Payments of 2020 MD tax; Pay past year MD tax in 2020
		Receive disability retirement payments for injury as a firemen or police officer? (a)
		Work for police or fire department & have income for use of official vehicle?(j)
		Volunteer or work for fire or rescue and get a Length of Service awd? (n)
		Volunteer or work for fire or rescue and get a Goldstein Certificate? (va)
		Volunteer police auxiliary or Reserve and get a Goldstein Certificate (vb)
		Volunteer for a fire department and have unreimbursed mileage exp? (q)
		Receive payment as a surviving spouse or beneficiary of a law enforcement office or firefighter killed in the line of duty? (aa)
		Work for police & live and work in high crime subdivision (oo)
		Receive a Solar Energy grant from MD that is on Fed return (ee)
		Being blind, pay for a reader? (h)
		Adopt a child with or without special needs? (k)
		Have unreimbursed expenses for a foster child living with you? (w)
		Have certificate for a tax credit (4 possible credits: CC 1, CR K, L, and R )
		Teacher with unreimbursed classroom exp beyond fed limit (\$250) (tt)
		Donate antlerless venison to feed hungry (CR G)
		Contributed to an ABLE account (xd)
		Anyone on return has NO Health Insurance NOW

## AARP FOUNDATION TAX-AIDE TAX PREPARATION

### Documents We Need to Prepare Your Tax Return

Following are the documents we need to prepare your tax return. ~~If you are scanning your documents to email them to us, please organize and scan them in the same order as they are listed below.~~

**PLEASE NOTE: You MUST ~~scan and~~ provide items (1), (2) or (3), and (4).** These items are required by law. If you do not provide these items, we will not be able to prepare your return. **Provide all other items that are applicable to you.** Do not send us any of your information unless you have ALL of your 2020 tax documents. Look at your last tax return (2019 or 2018) and make certain that you either have a tax form from every person / organization from which you received one in that year, or know why you do not have that form for the current year.

ITEM	DESCRIPTION / NOTES
1) Government-issued photo ID for you and your spouse (if married)	Driver's license, military or other government ID card
2) Front of your Social Security card (and that of your spouse, if married)	
3) Front of the Social Security card(s) for each of your dependents (everyone who will be listed on your return) OR ITIN numbers for everyone named on your return	
4) IRS Form 14446 signed by you and your spouse, if married	
Your most recent Federal tax return (2019 if filed, 2018 if you have not yet filed for 2019)	Please provide pages 1 and 2 of the Form 1040, Schedules 1, 2, and 3 (if present), and all other forms and schedules. We do not need your supporting documents (i.e., Forms W-2, 1099-\$, etc.)
Wages / Salary from employment (Form W-2)	These are the documents from your employer showing your wages / salary for the year
Form 1099-G	This document is used to report any State/Local tax refund AND/OR unemployment compensation you received
Form 1099-INT / 1099-DIV – Interest and Dividends	You may receive these from your bank, credit union, investment firm, and other sources of interests or dividend income
Form 1099-R	Income received by way of a distribution from a profit-sharing, retirement , IRA, annuity, pension, insurance contract, or survivor income benefit plan.
Form RRB-1099-R	Retirement / pension income from you or your spouse's railroad retirement

ITEM	DESCRIPTION / NOTES
SSA-1099-R	Pink and white statement from Social Security Administration showing benefits received in 2020
Form 1099-Misc	Reflects income received from royalties, rents, prizes or awards, or medical and health care payment
Form 1099-NEC	Reflects income received for work performed as an independent contractor or for self-employment
Expenses and mileage information related to your self-employment	Please use the enclosed Schedule C Worksheet to summarize these expenses
Documentation of all cash income you received	All cash income is reportable and subject to tax; do not include any income you received that is reflected on one of your other tax documents
Form 1099-K	You may receive this form if you performed for-hire driving services or if you received income through a third-party payment network (you might receive this form if you drove for Uber, Lyft, DoorDash, GrubHub, etc.)
Capital gains information	Brokerage statements, etc., showing your stock, bond, or other investment transactions
Form 1099-S	You may receive this form if you sold a home, residence, or real estate
Schedule K-1 (Form 1063, 1120S, or 1141)	
Information regarding alimony you paid or received in 2020	We will need the name of your former spouse and their Social Security number
All information related to itemized deductions	Please use the attached Schedule A Worksheet to summarize this information
Information regarding child or dependent care you paid	Please provide the name, address, and EIN of the care provider, as well as the amount you paid and for which child or dependent the care was provided
Amount of any gambling winnings for the tax year	This includes bingo, lottery winnings even if you did not receive a tax document for the amount(s)
Amount of any gambling losses for the tax year, if you had gambling winnings	
Cancellation of Debt Form 1099-C	For nonbusiness credit card debt ONLY
Forgiveness of Main Home Mortgage – Form 982	If part or all of your mortgage was forgiven / cancelled, you will have this form from the lender
Form 1099-Q	You will receive this document if you took a distribution from a Qualified Education Program
Form 1098-T	You will receive this document from educational institutions attended by you, your spouse, or your dependents
Information regarding education expenses	Please summarize this information on the enclosed Education Worksheet; use a separate sheet for EACH student on your return

ITEM	DESCRIPTION / NOTES
Information regarding any estimated tax payments you make to the IRS or your State tax agency	
Form 1095-A	If you or anyone on your tax return had medical insurance coverage through the Marketplace, information from your Form 1095-A MUST be included on your tax return
Proof of bank account routing and account numbers for direct deposit (this is the fastest and safest way to receive your refund)	Please provide a voided check

# How AARP Foundation Tax-Aide Can Help You Today

We offer free tax return preparation to anyone who needs it. AARP Foundation Tax-Aide volunteers are trained to help you file a variety of income tax forms and schedules.

In certain situations, however, our volunteers may be unable to provide assistance. The Volunteer Protection Act requires that our volunteers stay within the scope of tax law and policies set by the IRS and AARP Foundation. Here's a guide to what our Tax-Aide volunteers can — and can't — do.

## We can prepare most returns with:

- Wages, interest, dividends, capital gains/losses, unemployment compensation, pensions and other retirement income, Social Security benefits.
- Self-employment income, with limits.
- Most income reported on Form 1099-MISC or Form 1099-NEC.
- Schedule K-1 that includes only interest, dividends, capital gains/losses or royalties.
- Charitable cash contributions
- Qualified Business Income deduction.
- Economic Impact Payments (aka Stimulus Payments)
- Coronavirus-related distributions from retirement plans
- Itemized deductions, including noncash contributions to charity that total no more than \$5,000.
- Cancellation of nonbusiness credit card debt.
- IRA contributions — deductible or not.
- Most credits, such as earned income tax credit, education credits, child/additional child credit and credit for other dependents, child/dependent care credit, premium tax credit, simplified method foreign tax credit, and retirement savings credit.
- Repayment of first-time homebuyer credit.
- Estimated tax payments.
- Injured spouse allocation, depending on state.
- Health Savings Accounts (HSA).
- Amendments to filed returns.
- Prior three tax years' returns.

## We can't prepare returns with:

- Self-employment if there are employees, losses, expenses that exceed \$35,000, depreciation, business use of home, 1099 filing requirements or other complicating factors.
- Hobby income or other activities not for profit
- Complicated capital gains/losses, such as futures or options.
- Complicated Schedule K-1.
- Rental income, except land-only rentals or rentals of personal residence less than 15 days.\*
- Royalty income with expenses if not from self-employment.
- Tax on a Child's Investment and Other Unearned Income (Kiddie Tax).
- Farm income or expenses.
- Moving expenses.\*
- Some investment income or itemized deductions that are not included in our training.
- Alternative Minimum Tax, Additional Medicare Tax, or Net Investment Income Tax.
- Foreign financial asset reporting requirements.

\* **Rental or moving:** A volunteer can prepare returns for active duty military personnel only when the preparing volunteer is certified in the military module and another volunteer is certified to review military returns.

*AARP Foundation Tax-Aide is offered in conjunction with the IRS.*

**AARP** Foundation®  
For a future without senior poverty.

1-888-227-7669 [aarpfoundation.org/taxaide](https://aarpfoundation.org/taxaide)



## AARP FOUNDATION TAX-AIDE TAX PREP

### Explanation of IRS Form 14446

Form 14446 is an IRS-required form and this completed form is mandatory for the preparation of your return. Your signature on this form gives AARP Foundation Tax-Aide permission to prepare your return in a non-face-to-face environment.

Preparation of your return will require the use of one or more of the following: (a) scanned documents, (b) telephone or Google Meet for taxpayer interviews, resolution of questions that arise during return preparation or quality review, review of the completed return, and (c) the use of email. Exactly which of these methods will be used in preparation of your return depends on which service delivery model you are using.

Our service delivery models are Traditional Scan, Low Contact, and Contact Free. This packet contains a separate document, titled “How Your Return Will be Prepared”, that explains what technologies are used to prepare your return under each of these models.

Before signing the Form 14446, you have the right to fully understand how your return will be prepared, quality reviewed, and delivered to you. Please read the “How Your Return Will be Prepared” document. If you have any questions, please contact the Tax-Aide volunteer who sent you this information.

If you do not have any questions and agree to your return being prepared as described in the “How Your Return Will be Prepared” document, you and your spouse (if married) must sign and date page 3 of the Form 14446.

If you are scanning your documents for delivery to our volunteers (using the Contact-Free Model), you **must** include all three pages of the Form 14446 in the scan files you send to us. If the signed 14446 is not included with your files, we will contact you and you will have 72 hours to send a scan of the entire 14446 to us. If we do not receive the signed 14446 in that time, we are required to **delete all of the files you have provided**. We cannot start or prepare your return without having the signed Form 14446.

If you are coming to a site for our volunteers to scan your documents, you **must** bring the signed Form 14446 – signed by you and your spouse, if married – to your appointment. We cannot scan your documents without the signed Form 14446.

## COVID-19 SCREENING

Please read each of the following questions carefully. If you answer **Yes** to **ANY** of these questions, please contact us; we will reschedule your appointment to a later date.

In the past 48 hours, have you experienced any of the following symptoms:

- Fever or chills
- Cough
- Shortness of breath or difficulty breathing
- Fatigue
- Muscle or body aches
- Headache
- New loss of taste or smell
- Sore throat
- Congestion or runny nose
- Nausea or vomiting
- Diarrhea

Within the past 14 days, have you been in close physical contact (6 feet or closer for at least 15 minutes) with a person who is known to have laboratory-confirmed COVID-19 or with anyone who has any symptoms consistent with COVID-19?

Are you isolating or quarantining because you may have been exposed to a person with COVID-19 or are worried that you may be sick with COVID-19?

Are you currently waiting on the results of a COVID-19 test?

If you answered **NO** to **ALL** of the above questions, please come to your scheduled in-person appointment and bring all of your required materials with you.

If you answered **YES** to **ANY** of the above questions, please contact us and we will reschedule your appointment for a later date.

## HOW YOUR RETURN WILL BE PREPARED BY AARP FOUNDATION TAX-AIDE

### Montgomery County Tax Aide is using the Low-contact Tax preparation method

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#### Traditional-Scan Tax Preparation

1. Under the Traditional-Scan service, you will be given an appointment and asked to complete IRS Form 14446 (this form authorizes us to assist you with preparation of your return using scanning technology and Cloud storage) and the Tax-Aide Intake Booklet prior to arriving for your appointment.
2. When you arrive for your appointment, a Tax-Aide volunteer will review all of your documents; conduct an intake interview; and scan your signed Form 14446, completed Intake Booklet, government-issued photo ID, Social Security cards for yourself and everyone listed on your return, and all of your tax documents.
3. The scanned files will be uploaded to a secure Google Drive. Your tax information will be shared only with the Tax-Aide Counselors who are assigned to prepare your return. Before leaving the site, you will be given an appointment time taking place no more than one week later.
4. When you come back for your follow-up appointment, one of our Counselors will review the completed return with you. After approving the return, you will be asked to sign an IRS Form 8879. Your signature on the Form 8879 (1) authorizes us to e-file your return on your behalf and (2) acknowledges that you understand the accuracy and completeness of the return is your responsibility. You will receive the original Form 8879 with your signature and a copy of your tax return prior to leaving the site.
5. All of your scanned files will be deleted within 48 hours following acceptance of your e-filed return by all applicable tax agencies (IRS and your State Department of Revenue, if applicable) or 14 days following the date on which your documents are scanned.

#### Low-Contact Tax Preparation

1. The Low-Contact service method has two options. The first option requires only one in-person meeting (roughly 15 – 20 minutes) between you and our volunteers. The second option requires two in-person meeting between you and our volunteers; the first meeting will be roughly 15 – 20 minutes, the second will be roughly 10 minutes.

2. For the one visit option, you must have access to a computer, an Internet connection, and email, a printer, and the ability to participate in a Google Meet video conference on your computer (the video conference does not require any special software and we will provide you with instructions). For the two-visit option, you must have access to a computer, an Internet connection, email.
3. Under the Low-Contact service method, you will be given an appointment and asked to complete IRS Form 14446 (this form authorizes us to assist you with preparation of your return using scanning technology, Cloud storage for your information, and secure email) and the Tax-Aide Intake Booklet prior to arriving for your appointment. When you arrive for your appointment, a Tax-Aide volunteer will scan your signed Form 14446, completed Tax-Aide Intake Booklet, your government-issued photo ID, Social Security cards for yourself and everyone listed on your return, and all of your tax documents.
4. The scanned files will be uploaded to a secure Google Drive. Your tax information will be shared only with the Tax-Aide Counselors who are assigned to prepare your return. You will be given an appointment for a telephone or Google Meet intake interview with a Tax-Aide volunteer.
5. Once your return has been prepared and quality reviewed by a team of our IRS-certified Counselors, you will receive an electronic copy of your completed return and an IRS Form 8879 via a shared file link. One of our Counselors will review the return with you via phone or Google Meet video conference.
6. Once you approve the return, and depending on whether you have elected to have one in-person meeting with our volunteers or two in-person meetings, you will either (a) return to the site on a date and at a time that has been scheduled, sign the Form 8879, and receive a printed copy of your return; or, (b) print out a copy of the Form 8879, sign it during the Google Meet video conference, and show it to the computer's camera so our Counselor can see the signed document. Your signature on the 8879 (1) authorizes us to e-file your return on your behalf and (2) acknowledges that you understand the accuracy and completeness of the return is your responsibility. **Your return cannot be e-filed until you have signed the Form 8879 in the presence of our volunteers or during a Google Meet video conference with one of our volunteers.**
7. All of the scan files you provide to us will be deleted within 48 hours following acceptance of your e-filed return by all applicable tax agencies (IRS and your State Department of Revenue, if applicable) or 14 days following the date we originally scanned your documents.

#### Contact-Free Tax Preparation

1. Using the Contact-Free method, everything will be done virtually; there will be no in-person meetings between you and our volunteers. You must have access to a computer, an Internet connection, email, a printer, and the ability to participate in a Google Meet video

## AARP FOUNDATION TAX-AIDE TAX PREPARATION Joining a Google Meet Session

Google Meet is a conferencing tool that allows you to participate in a video meeting – if your computer has a camera, microphone, and speakers.

Tax-Aide Counselors may schedule a Google Meet video conference with you – to conduct the intake interview, review the completed return with you, ask you any questions that arise during the preparation or quality review of your tax return.

Counselors also are able to call your telephone number from within the Google Meet application. **The caller ID that appears on your phone will be from a number you do not recognize. Please answer this call; we are unable to implement a more specific caller ID.**

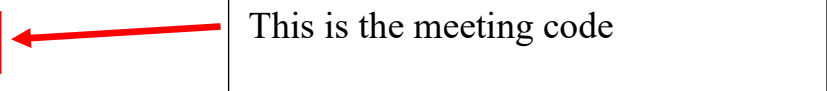
### JOIN A VIDEO MEET SESSION FROM A MEETING LINK

You can join a video meeting by clicking on the link sent to you in an email.

- Click the meeting link sent to you
- Follow the onscreen prompts to join the meeting
- An email invitation will look similar to the following:

PAMELA H. has invited you to join a video meeting on Google Meet.

[meet.google.com/oso-msrx-mja](https://meet.google.com/oso-msrx-mja)



This is the meeting code

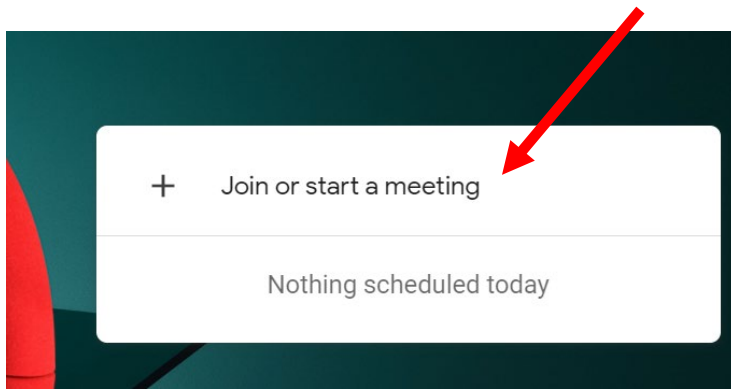
Or open Meet and enter this code: oso-msrx-mja

Dial in (audio only): (US) +1 402-855-5225 PIN: 101 740 604#

More phone numbers: <https://tel.meet/oso-msrx-mja?pin=5467397017451>

### JOIN A VIDEO MEET SESSION FROM THE GOOGLE MEET WEBSITE

- Open a web browser, enter <https://meet.google.com>
- Click “Join or start a meeting”



- Enter the meeting code in the email you received (or in the invitation you received)
  - The meeting code is a string of letters at the end of the meeting link – you do not have to enter the hyphens
- You may receive an email with only the meeting code, just enter the meeting code as described here and you will be able to join the video session

Join or start a meeting

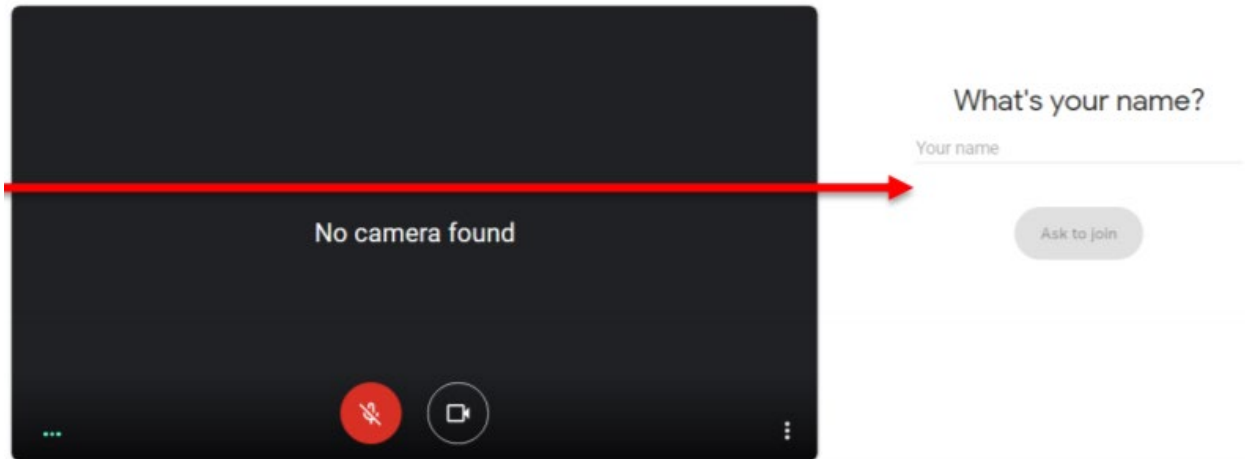
Enter the meeting code or nickname. To start your own meeting, enter a nickname or leave blank.

**ENTER MEETING CODE HERE**

[Learn how to schedule a meeting](#)

Continue

- Click CONTINUE
- Enter your name and press “Ask to Join”



## JOIN A GOOGLE MEET PHONE-ONLY CONFERENCE

You can also use Google Meet to participate in a phone-only conference.

- The Counselor scheduling the meeting will either send you a meeting invitation or an email containing the phone number and PIN needed to join the phone conference
- Dial the number provided enter the PIN when prompted to do so.

PAMELA H. has invited you to join a video meeting on Google Meet.

[meet.google.com/oso-msrx-mja](https://meet.google.com/oso-msrx-mja)

Or open Meet and enter this code: oso-msrx-mja

Dial in (audio only): (US) +1 402-855-5225 PIN: 101 740 604#

More phone numbers: <https://tel.meet/oso-msrx-mja?pin=5467397017451>

You can also receive a phone call from a Counselor who has logged onto a Google Meet session. The person in the meeting will enter your phone number to add you to the meeting. You will receive a telephone call and will be able to speak with the Counselor. The caller-ID number on your display will be **617-675-4444**. You will know what date and time our volunteer will call, please answer the call; we will only call you for matters related to preparation and filing of your tax return.

## Are You (and/or your spouse) Self-Employed? **START HERE!**

☐ I paid employees or other individuals  
☐ I had more than \$35,000 in business expenses  
☐ I kept an inventory for my business  
☐ I have assets to depreciate (any > \$2,500)

☐ I want to deduct a home office  
☐ I received a Form 1095-A  
☐ I need to report a business loss  
☐ I don't use the cash method of accounting

***If you checked any of the above, please stop here and speak with one of our Counselors.***

***If you checked none of these above, please continue by completing the worksheet below for **each** business.***

Income	
Forms 1099 (-NEC, -MISC, -K)	\$
Cash, checks, etc. (incl. tips)	\$
Business expenses	
Advertising	\$
Commissions and fees	\$
Health insurance premiums	\$
Business insurance	\$
Interest on business loans	\$
Office expense/supplies	\$
Rent (not home office)	\$
Repairs	\$
Supplies	\$
Licenses or fees	\$
Business use of car or truck	
Total mileage for year	
Business miles	
Commuting miles	
Other miles	
Vehicle description:	
Date placed in service:	

Business expenses (cont)	
Business part of phone	\$
Training for this business	\$
Tools, etc. under \$2,500 each	\$
Travel away from home	\$
Other (specify)	\$
Car or truck expenses	
Car loan interest	\$
Parking, tolls	\$
Other (specify)	\$

**Drivers** – be sure you have with you:

- All Forms 1099 **AND** the detail provided by the company (Door Dash, Lyft, Postmates, Uber, etc.) – you need to download and print the detail from each company's site.
- Your trip miles **AND** your between-trip miles (do not include from home to first stop nor from last stop to home).



## Itemized Deductions Worksheet

**Guidance:** We do not need your details. Just enter your totals for each expense line even if it doesn't seem like you will have enough to itemize. We will determine whether your total itemized deductions or the Standard Deduction for 2020 is better for you. [Single or Married Filing Separately: \$12,400. Married Filing Jointly: \$24,800. Head of Household \$18,650. In addition, if blind or over 65: \$1,300 for each married filer on a joint return, \$1,650 for Single and Head of Household filers.]

### Medical and Dental Expenses

**Guidance:** Medical and dental expenses are **deductible only to the extent they exceed 7.5%** of your Adjusted Gross Income for Tax Year 2020 and are not reimbursed/paid by insurance.

Medical and dental insurance premiums paid to insurer by taxpayer or spouse, ( <b>exclude</b> Medicare reported on an SSA-1099; <b>exclude</b> premiums reported on a Schedule C worksheet)	\$
Long term care insurance premiums ( <b>exclude</b> premiums reported on a Schedule C worksheet) (if more than one person list each separately)	\$
Amounts paid directly to doctors and dentists	\$
Amounts paid for prescription medications	\$
Amounts paid for medical imaging (X-Rays, CAT Scans, MRI, etc.), Lab Work, ...	\$
Nursing care (excluding healthy baby or housework components of payments)	\$
Hospital care including meals and lodging	\$
Medical aids (prescription eye glasses, hearing aids, crutches, wheelchairs, ...)	\$
Medical mileage driven for care	# miles
Other medical expenses (explain)	\$

Notes and questions:

### Taxes You Paid

(generally limited to a maximum of \$10,000)

Did you live in the same Zip Code all year?	Y/N	If 'No', what other Zip Codes did you live in last year?	Zip 2	Days
IF 'No', how many days did you live in the Zip Code on your Intake Form?	Days		Zip 3	Days
Sales tax on major purchases (car/boat/motorhome, home purchase or substantial addition to home, if general sales tax applies, ...)	\$			
4 <sup>th</sup> Quarter 2020 State Income Tax Estimated Payment if paid <b>after</b> 12/31/2019	\$			
Property taxes (non-Business Property)	\$			
Tax deductible portion of vehicle registrations (only the line labeled "vehicle license fee")	\$			
Other State & Local taxes (explain):	\$			

# Itemized Deductions Worksheet

## Mortgage Interest

**Guidance:** Mortgage Interest is only deductible for mortgages on your primary residence and one secondary home, up to certain principal amounts depending on the year the loan originated, and only to the extent proceeds were used to buy, build or substantially improve the residence which is the collateral for the mortgage. The interest on a home equity loan is disallowed as a mortgage interest deduction unless the home equity loan was used to build, buy, or substantially improve a qualified residence. Interest on loans which do not meet these requirements is not deductible.

**Include any Form 1098 Mortgage Interest Statements in the Tax Documents you provide to Tax-Aide**

Were the proceeds of the loan(s) used entirely to buy, build or substantially improve only the residence which is the collateral for the mortgage? If <b>No</b> , we will be unable to include mortgage interest as an itemized deduction.	Y/N	Y/N
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Main home mortgage (add second page if there is a secondary home)	Original principle amount	\$
	Date of loan	
	2020 interest paid	\$
	Private Mortgage Insurance required by lender	\$
Home equity loan used only to build, buy, or substantially improve residence	Original principle amount	\$
	Date of loan	
	2020 interest paid	\$
	Private Mortgage Insurance required by lender	\$

## Gifts to Charity

Note: up to \$300 of cash charitable contributions can be deducted if you do not itemize.

<b>Cash Gifts to Charity</b> - (including check, credit/debit card) – Enter as a total on this line: (you need to keep evidence of each; if \$250 or more, must be in writing from charity)	\$
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Did you make non-cash gifts to charity(s)?	Y/N	Charitable mileage	Miles
IF 'Yes' did they total less than \$500?	Y/N	Total of all non-cash gifts	\$

IF non-cash gifts total more than \$500 continue providing required information for each charity below. If you donated to more than two charities add a page. **If you donated a vehicle include the 1098C in the Tax Documents you provide.** (We are unable to prepare your return if the total is more than \$5,000 or you donated a vehicle worth more than \$500.)

For non-cash gift to charity > \$500 provide a description and fair market value of the property for each charity: <i>Description</i>	\$ FMV
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Name & address of the organization you donated to:

Date of contribution: MM/DD/YY	Date you acquired: MM/DD/YYYY	Did you receive a 1098C? Y/N
--------------------------------	-------------------------------	------------------------------

For a non-cash gift to charity > \$500 provide a description and fair market value of the property: <i>Description</i>	\$ FMV
--	--------

Name & address of the organization you donated to:

Date of contribution: MM/DD/YY	Date you acquired: MM/DD/YYYY	Did you receive a 1098C? Y/N
--------------------------------	-------------------------------	------------------------------

## Miscellaneous Itemized Deductions

Gambling losses (if more than gambling winnings, also check here [ ])	\$
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# Self-Employed COVID-19 Tax Provisions

**To be completed only if you or your spouse had a business during 2020.**

Name of the business owner: \_\_\_\_\_

**Please answer the following for each business owner.**

A special provision for 2020 allows you to defer payment of the employer portion of the Social Security tax that is included in your self-employment tax. The amount involved is about 5.7% of your self-employment profit from 3/27/20 to 12/31/20. You may use either the IRS default allocation ratio of 77.5% of your full-year profit or your actual records. If elected, one-half of the deferred tax would be due with your 2021 return and the second half would be due with your 2022 return.

- Do you want to defer payment of part of your self-employment tax? \_\_\_\_\_yes\_\_\_\_\_no
- If yes, enter your profit for 3/27/20 to 12/31/20: \$ \_\_\_\_\_ or check to use 77.5% \_\_\_\_\_(✓)
- If yes, how much do you want to defer? \_\_\_\_\_% of my tax or check to use the maximum \_\_\_\_\_(✓)

Another special provision provides for a sick leave or family leave credit in certain circumstances.

Sick leave Part 1

A. Were **you** unable to work in your business because **you** were:

- subject to a COVID-19 quarantine or isolation order \_\_\_\_\_yes\_\_\_\_\_no
- advised to self-quarantine because of COVID-19 \_\_\_\_\_yes\_\_\_\_\_no
- \_\_\_\_\_ had COVID-19 symptoms and sought a medical diagnosis \_\_\_\_\_yes\_\_\_\_\_no

As a result, how many days were you unable to work in your business from 4/1 to 12/31/20? \_\_\_\_\_

Sick leave Part 2

B. Were **you** unable to work in your business because **you**:

- cared for someone who was subject to a COVID-19 quarantine or isolation order \_\_\_\_\_yes\_\_\_\_\_no
- cared for someone who was advised to self-quarantine because of COVID-19 \_\_\_\_\_yes\_\_\_\_\_no
- cared for a child\* whose school or place of care was closed due to COVID-19 \_\_\_\_\_yes\_\_\_\_\_no
- cared for a child\* whose child care provider was unavailable due to COVID-19 \_\_\_\_\_yes\_\_\_\_\_no

As a result, how many days were you unable to work in your business from 4/1 to 12/31/20? \_\_\_\_\_

Family leave

C. Were **you** unable to work in your business because **you**:

- cared for a child\* whose school or place of care was closed due to COVID-19 \_\_\_\_\_yes\_\_\_\_\_no
- cared for a child\* whose child care provider was unavailable due to COVID-19 \_\_\_\_\_yes\_\_\_\_\_no

As a result, how many days were you unable to work in your business from 4/1 to 12/31/20? \_\_\_\_\_

\* A child includes an individual who is under age 18 and is: your biological, adopted, or foster child; your stepchild; a legal ward; a child for whom you are standing in loco parentis (someone with day-to-day responsibilities to care for or financially support a child). It also includes an adult son or daughter (18 years of age or older), who (1) has a mental or physical disability, and (2) is incapable of self-care because of that disability.

Please retain any documentation you have to support your lost workdays with your tax records.

For volunteer use: Amount of employer sick leave pay (\$511 limit) \$ \_\_\_\_\_ (\$200 limit) \$ \_\_\_\_\_

Amount of employer family leave pay \$ \_\_\_\_\_

# Education Credits Worksheet

Please complete one worksheet for each student.

There are 3 education credits: the American Opportunity Credit, the Lifetime Learning Credit, and the Tuition and Fees Deduction. Your eligibility depends on many things, including: your filing status, the student's filing status, the student's enrollment status, your adjusted gross income, what expenses were paid, who paid the expenses, when expenses were paid, whether the school is an eligible educational institution, whether any expenses were paid with tax-exempt funds, and whether any expenses were paid with distributions from a Coverdell Education Savings Account or Qualified Tuition Program.

Our Counselors will rely upon your answers to the following questions to determine your eligibility for education credits. It is important that you accurately respond to all of the following items that apply to your situation.

Student Information	
Dependent student's filing status: Single (S); Married Filing Joint (MFJ) (or filing just to get a refund of withholding); Married Filing Separate (MFJ); Qualifying Widow(er) (QW); Head of Household (HH)	
Was student's earned income less than one-half of their support? (Yes / No)	
Was at least one parent alive at the end of the tax year? (Yes / No)	
Is student enrolled in a degree or other credential program? (Yes / No)	
Is student enrolled full-time (FT), half-time (HT), or less than half-time (Less)	
Had student completed the first four years of postsecondary education at the beginning of the tax year? (Yes / No)	
Has student used the American Opportunity Credit for four tax years? (Yes / No)	
Was the student ever convicted of a drug felony? (Yes / No)	
Funding Sources (list amount received from each source, use separate sheet as needed)	
Unrestricted grants or scholarships eligible for living expenses	\$
Other scholarships or fellowships	\$
Was a W-2 issued for any of this income? (Yes / No)	
Amount <u>required</u> to be spent on anything other than tuition, fees, books or equipment	\$
Distributions from Coverdell Education Savings Account (ESA)	\$
Distributions from Qualified Tuition Plans (529 Plans)	\$
Early distributions from IRAs (with no early distribution penalty)	\$
Series E Savings bonds used for tuition and requirement enrollment fees (with tax-exempt interest)	\$

## Education Credits Worksheet

Each of the education credits covers some education expenses, none of them cover all expenses. Tuition and other expenses that are necessary for enrollment are generally covered. Non-essential fees, such as transportation costs, room and board, sports fees, and student health fees may not be covered.

Institutions issue a Form 1098-T to their students. You must provide all Forms 1098-T with your other tax documents; if you do not have it or have lost it, check the student's on-line school account or contact the educational institution to obtain them before submitting to Tax-Aide.

The student statement of account available from the educational institution's Finance Office contains information that is important in determining qualifying expenses. Generally, the student can go online to obtain a copy of their statement of account. Please include a copy of each student's statement of account with your other tax documents.

<b>Expenses</b> <i>(Not all expenses qualify for all of the Education Credits)</i>	
Tuition	\$
Student activity fees, if required for enrollment	\$
Required books that <u>must</u> be purchased from the institution	\$
Required books purchased from a bookstore or second hand	\$
Required supplies and equipment fees which must be purchased from the institution	\$
Other required supplies and equipment	\$
Living expenses even if living at home	\$
Required insurance or student health fees	\$
Expenses for special needs services	\$
	\$
	\$
	\$
	\$

## **AARP Foundation Tax-Aide Privacy Information TY2020**

### **Privacy Information**

AARP Foundation operates the AARP Foundation Tax-Aide program under a cooperative agreement with the IRS. In order to help complete your tax returns, AARP Foundation's trained and IRS-certified volunteers will see personal information that you give them about you and your finances. This information is strictly confidential. We will not share your information with anyone except as necessary to accurately file your tax returns, as otherwise required by law, or with your consent. AARP Foundation Tax-Aide and the IRS-approved tax software vendor keep different types of information about you for different periods of time. We keep your return information temporarily so that we can electronically process your return and ensure acceptance by the IRS as well as any state taxation authority. This personal data is kept confidential and secure and will not be sold, given away or used for any commercial purpose. We also keep and use de-identified aggregated data, (for example, city, state, ZIP codes of people the program served, number of people the program served, etc.) summarized at the site level for program impact analysis. This data does not include personally identifiable information about any individual taxpayer. If you have any questions about this notice, please contact us at [taxaide@aarp.org](mailto:taxaide@aarp.org) or 888-227-7669

### **Información de privacidad**

AARP Foundation Tax-Aide es un programa de AARP Foundation que se ofrece bajo un acuerdo de cooperación con el IRS. Para ayudarte a completar tus formularios de impuestos, los voluntarios de AARP Foundation capacitados y certificados por el IRS verán la información personal que les proporciones sobre ti y tus finanzas. Esta información es estrictamente confidencial. No compartiremos tu información con nadie, excepto con quienes sea necesario hacerlo para presentar tus declaraciones de impuestos o según lo requiera la ley o con tu consentimiento. AARP Foundation Tax-Aide y la empresa que proporciona el software de impuestos aprobado por el IRS conservan distintos tipos de información sobre ti por diversos períodos. Conservamos información sobre tu declaración de impuestos de manera temporal para poder procesarla electrónicamente y garantizar que es aceptada por el IRS y por las oficinas de impuestos estatales. Esta información personal se mantiene confidencial y segura, y no se venderá, entregará ni usará con ningún motivo comercial. También

mantenemos y usamos información no identificable o agregada, (por ejemplo: ciudad, estado, códigos postales de las personas a quienes prestó servicios el programa, la cantidad de personas a las que se ayudó, etc.) resumida a nivel del centro para analizar los efectos del programa. Esta información no incluye información de identificación personal relativa a ningún contribuyente en particular. Si tienes preguntas relacionadas con este aviso, comunícate con nosotros en [taxaide@aarp.org](mailto:taxaide@aarp.org) o 888-227-7669.



# Your Civil Rights are PROTECTED

## Sus Derechos Civiles están PROTEGIDOS



In accordance with federal law and the Department of the Treasury – Internal Revenue Service policy, discrimination against taxpayers on the basis of race, color, national origin (including limited English proficiency), disability, sex (in education programs or activities), age or reprisal is prohibited in programs and activities receiving federal financial assistance.

Taxpayers with a disability may request a reasonable accommodation and taxpayers with limited English proficiency may request language assistance to access service.

De acuerdo con la ley federal y la política del Departamento del Tesoro - Servicio de Impuestos Internos, la discriminación contra los contribuyentes basada en raza, color, origen nacional (incluso el dominio limitado del inglés), discapacidad, género (en los programas educativos o actividades), edad o represalia, está prohibida en los programas o actividades que reciben asistencia financiera federal.

Los contribuyentes con una discapacidad pueden solicitar acomodo razonable y contribuyentes con un dominio limitado del inglés podrán solicitar asistencia con el idioma para tener acceso al servicio.

**Operations Director,  
Civil Rights Division  
Internal Revenue Service  
Room 2413  
1111 Constitution Avenue, NW  
Washington, DC 20224**

If a taxpayer believes he or she has been discriminated against, a written complaint should be sent to the address referenced within. For all other inquiries concerning taxpayer civil rights, contact us at the mailing address or e-mail us at [edi.civil.rights.division@irs.gov](mailto:edi.civil.rights.division@irs.gov)

Do not send tax returns or other tax-related information to the Civil Rights Division office or e-mail address.

Si un contribuyente cree que él o ella ha sido discriminado, debe enviar una queja por escrito al *IRS*, a la dirección de referencia. Para todas las demás consultas relacionadas a los derechos civiles del contribuyente, comuníquese a la dirección que aparece a la izquierda o envíenos un correo electrónico a [edi.civil.rights.division@irs.gov](mailto:edi.civil.rights.division@irs.gov)

No envíe declaraciones de impuestos u otra información que no esté relacionada con los derechos civiles, a la oficina de la División de Derechos Civiles o al correo electrónico.





# VITA/TCE Free Tax Programs

The mission of these programs is to provide free basic tax return preparation for low-to-moderate income and elderly taxpayers. This also includes taxpayers with disabilities, limited English proficiency and the Military.

Volunteers participating in these programs must sign a Form 13615, Volunteer Standards of Conduct Agreement - VITA/ TCE Programs. These agreements require them to provide high quality service and uphold the highest ethical standards.

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-required site operations and volunteer ethical standards. In addition, the locations of these sites may not be in or on federal property.

To report unethical behavior to IRS, e-mail us at [wi.voltax@irs.gov](mailto:wi.voltax@irs.gov)



# Programas de Impuestos Gratuitos Ofrecidos por VITA/TCE

El Servicio de Impuestos Internos (IRS, por sus siglas en inglés), patrocina los programas de Asistencia Voluntaria al Contribuyente para la preparación de los Impuestos sobre el ingreso (VITA, por sus siglas en inglés), y el de Asesoramiento Tributario para las Personas de Edad Avanzada (TCE, por sus siglas en inglés).

La misión de estos programas es proporcionar la preparación gratuita de las declaraciones de impuestos sencillas a los contribuyentes de ingresos bajos a moderados y contribuyentes de edad avanzada. Esto incluye también a los contribuyentes con discapacidades, aquéllos con dominio limitado del inglés y la milicia.

Aunque el IRS es responsable de proporcionar los requisitos de supervisión para los programas de Asistencia Voluntaria al Contribuyente (VITA) y de Asesoramiento Tributario para las Personas de Edad Avanzada (TCE), estos sitios son operados por socios patrocinados por el IRS que administran las operaciones requeridas por el sitio y los estándares de ética de los voluntarios. Además, es posible que las ubicaciones de estos sitios no estén en la propiedad federal.

Los voluntarios que participan en estos programas, tienen que firmar el Formulario 13615, Volunteer Standards of Conduct Agreement - VITA/ TCE Programs (Acuerdo de los estándares de conducta de los voluntarios de los programas de VITA/TCE), en inglés. Estos acuerdos exigen que ellos proporcionen un servicio de alta calidad y mantengan los más altos estándares éticos.

Para denunciar un comportamiento no ético al IRS, envíenos un correo electrónico a [wi.voltax@irs.gov](mailto:wi.voltax@irs.gov)

## Taxpayer Information and Responsibilities

Welcome to AARP Foundation Tax-Aide. Our IRS-certified volunteers will assist you shortly. In the meantime, please take a moment to read the following information.

### Taxpayers will:

- Provide all required information and documents to ensure the completion of your return
- Sign-in at the tax site and follow the guidance of the volunteer
- Complete the Intake Booklet fully and accurately
- Participate in the intake interview, tax preparation and quality review process
- Inform the volunteer of all income including cash, gambling winnings, etc.
- Understand that some returns are beyond the program scope (see scope poster) or have complicated state or other issues. If your return falls outside the program scope, you must either prepare your own return or engage a professional preparer.
- Ensure the return is complete and accurate before signing. Joint returns require the signature of both spouses.
- Agree that you are responsible for the accuracy of the return
- Treat volunteers with courtesy and respect
- Questions? Call 888-687-2277 or email [taxaide@aarp.org](mailto:taxaide@aarp.org)

### Tax-Aide volunteers will:

- Treat taxpayers in a courteous and professional manner
- Prepare tax returns within the scope of the program
- Provide tax assistance based on the information and documents provided by the taxpayer
- Quality review all tax returns
- Respect taxpayers' privacy and confidentiality

## Essential Documents to Have at the Tax Site

- |  |  |
|--|--|
| <input type="checkbox"/> Government-issued photo ID for the taxpayer(s) on the return  | <input type="checkbox"/> Mortgage interest, medical/dental expenses, charitable donations, sales, income or property taxes         |
| <input type="checkbox"/> Social Security cards or ITIN documentation for all   | <input type="checkbox"/> Records of federal and state income taxes paid  |
| <input type="checkbox"/> Copy of last year's tax return  | <input type="checkbox"/> Educational expenses – Form 1098-T, student's detailed financial school account; other education expenses |
| <input type="checkbox"/> Income documents for wages, interest, dividends, capital gains/losses, unemployment compensation, pensions and other retirement income, Social Security benefits and self-employment. | <input type="checkbox"/> Checking or savings account info for direct deposit of refund or direct debit of balance due              |
| <input type="checkbox"/> Brokerage statements – sale of stocks or bonds  | <input type="checkbox"/> Any recent IRS or state tax department correspondence   |
| <input type="checkbox"/> Healthcare – Forms 1095 A if have marketplace insurance   |  |

## Tax-Aide Process

### Waiting Area

Sign-In  
Complete Intake Booklet  
Organize Your IDs, SS Cards  
and Tax Documents

### Tax Preparation

IDs, SS Cards Checked  
Intake Booklet and Tax  
Documents Reviewed  
Taxpayer Interviewed  
Tax Return Prepared

### Quality Review

IDs, SS Cards Checked  
Intake Booklet and  
Tax Documents Reviewed  
Taxpayer Interviewed  
Tax Return Reviewed  
Return Signed

## Información y responsabilidades del contribuyente

Bienvenido a AARP Foundation Tax-Aide. Nuestros voluntarios capacitados y certificados por el IRS te ayudarán pronto. Mientras tanto, toma un momento para leer la siguiente información.

### Los contribuyentes deberán:

- Proveer toda la información y documentación necesarias para asegurar que la declaración de impuestos pueda ser completada
- Iniciar sesión en el sitio web del programa Tax-Aide y seguir las instrucciones del voluntario
- Completar el "Intake Booklet" en su totalidad y con exactitud
- Participar en la entrevista inicial, la preparación de la declaración de impuestos y el proceso de revisión
- Informar a los voluntarios sobre todos ingresos, incluidos el dinero en efectivo, ganancias en juegos de azar y otros
- Entender que algunas declaraciones están fuera del alcance del programa (ver cartel relacionado), o presentan temas complicados relacionados con el estado u otros asuntos. Si su declaración está fuera del alcance del programa.
- Asegurarse de que la declaración de impuestos esté completa y correcta antes de firmar. Se requiere la firma de ambos cónyuges en las declaraciones conjuntas.
- Estar de acuerdo con que el contribuyente es responsable por la exactitud de los datos de la declaración
- Tratar a los voluntarios con amabilidad y respeto
- ¿Preguntas? Llama al 888-687-2277 o envía un correo electrónico a [taxaide@aarp.org](mailto:taxaide@aarp.org)

### Los voluntarios de Tax-Aide deberán:

- Tratar a los contribuyentes de manera cortés y profesional
- Preparar las declaraciones de impuestos dentro del alcance del programa
- Proveer asistencia en la preparación de declaraciones de impuestos según la información y documentación ofrecida por el contribuyente
- Hacer una revisión minuciosa de todas las declaraciones de impuestos
- Respetar la privacidad y confidencialidad del contribuyente

## Documentos esenciales que deben traer a la localidad de Tax-Aide

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Identificación con foto emitida por el Gobierno para todas las personas incluidas en la declaración de impuestos</li> <li><input type="checkbox"/> Tarjetas del Seguro Social o documentación con el número de identificación personal (ITIN) para todas las personas incluidas en la declaración de impuestos</li> <li><input type="checkbox"/> Copia de la declaración de impuestos del año anterior</li> <li><input type="checkbox"/> Documentación sobre los ingresos, o registros como trabajador independiente</li> <li><input type="checkbox"/> Declaración de gastos de inversiones: venta de acciones o bonos</li> <li><input type="checkbox"/> Seguro médico: formulario 1095-A, si tienen un seguro a través del Mercado</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Intereses hipotecarios, gastos médicos o dentales, donaciones benéficas, impuestos sobre las ventas, sobre la renta o sobre la propiedad</li> <li><input type="checkbox"/> Registros de los impuestos federales y estatales pagados</li> <li><input type="checkbox"/> Gastos educativos: formulario 1098-T, estado de cuenta detallado de la institución educativa, entre otros gastos educativos</li> <li><input type="checkbox"/> Información de una cuenta corriente o de ahorros para el depósito directo del reembolso o débito directo de la cantidad adeudada</li> <li><input type="checkbox"/> Cualquier correspondencia reciente del IRS o del departamento de impuestos estatal</li> </ul> |
|--|--|

## Proceso de Tax-Aide

### Área de espera

Registro de entrada  
Completar el "Intake Booklet"  
Organizar los documentos de identificación, documentos para la declaración de impuestos y las tarjetas del Seguro Social

### Preparación de la declaración de impuestos

Verificar la identificación y las tarjetas del Seguro Social  
Revisar el "Intake Booklet" y los documentos para la declaración de impuestos  
Entrevistar al contribuyente  
Preparar la declaración de impuestos

### Revisión minuciosa

Verificar la identificación y las tarjetas del Seguro Social  
Revisar el "Intake Booklet" y los documentos para la declaración de impuestos  
Entrevistar al contribuyente  
Revisar la declaración de impuestos  
Firmar la declaración de impuestos