



Get Ready for Tax Year 2021

The Volunteer Income Tax Assistance Program (VITA)

Beginning on January 31, 2022

The Volunteer Income Tax Assistance (VITA) program offers free tax help to anyone who makes less than \$57,000/year.

In order for us to prepare your tax return, you MUST provide copies of the following:

- Photo Identification** (e.g. Driver's License, State Identification Card, or Passport) for you (and your spouse if filing a Joint Return)
- Social Security cards** and dates of birth for the taxpayers, and the dependents OR Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted if you do not have a social security number. Proof of foreign status needed, if applying for an ITIN
- The **previous year's tax returns** if not done by SEVCA.
- Dept. of Treasury [IRS Intake/Interview & Quality Review Sheet \(Form 13614-C, October 2021\)](#) - must be completed and signed
- [Virtual VITA/TCE Taxpayer Consent Form \(Form 14446\)](#) – must be signed by all filing tax payers
- Stimulus Economic Impact Payment Amounts or Notices** from COVID-19 Care's Act (notice 1444A and 1444B) (if you don't receive a letter, it's important that you provide the correct amount received for reconciliation to avoid a deferred tax return.)
- *Wage Earners* -
 - Wage & Retirement earning statements** (Form W-2, W-2G, 1099-R, 1099-Misc, SSA 1099's). Note: employers have until January 31 to send these out and you must wait to receive them before filing.
 - Interest and dividend statements** (Forms 1099INT, 1099DIV)
- *VT Residents – Home/Property Owners* –
 - 2021 Town Tax Bill & [See VT Supplemental Form](#)**
- *VT Residents – Renters (6+ months)* -
 - See [VT Supplemental Form](#)**
- *Parents/Child Guardians* -
 - Advance Child Tax Credit Payments** under the American Rescue Plan. (The IRS will be mailing a Form Letter 6419 out in January 2022 for those whose received advanced child tax payments July through September 2021). This is a requirement for reconciliation of the payments for the 2021 tax year.
 - Child Dependent Care - **Total amount paid for a daycare provider and the daycare provider's tax identifying number** such as their Social Security number or Business Employer Identification Number.
- *Health Insured* -
 - VT Health Connect or any **Marketplace insurance premiums paid** - (Form 1095-A). If you have not received a form, please contact the State Marketplace for a copy to complete your taxes. All Marketplace insurances will send a 1095-A. If you do not report the 1095-A, the IRS will delay the return until the 1095 reconciliation has been completed.
- *Self-Employed with Schedule C's (Small businesses with inventory or employees are NOT eligible for the VITA program)*-
 - Documentation of expenses and all income** cash/receipts/etc.
- For Direct Deposit of Refund -
 - Proof of bank account routing & account numbers** or a voided blank check

Envelopes for clients' tax documents will be at all of our drop-box locations. On the envelope, please write the tax payer name(s), email address and the best contact phone number(s), and the date of drop off. Please also sign in on the virtual return receipt sheet, on top of the drop-box.

Locked Drop-Boxes will be at the following locations:

- Windsor Resource Center, 1 Railroad Avenue, Windsor, VT 05089.
- SEVCA Main Office, 91 Buck Drive, Westminster, VT 05158.
- SEVCA Family Services Outreach Office, 15 Grove Street, Brattleboro, VT 05301.

You may also mail documents to: SEVCA, Attn: VITA Program, 91 Buck Drive, Westminster, Vermont 05158.

Once the preparer has informed you of the outcome of your tax return, your signature(s) are required to have SEVCA e-file your tax return. See information below for signing the Tax Return for Electronic Filing by SEVCA or for mailed paper returns. There will be no exceptions as SEVCA must abide by the IRS Security Compliance Guidelines to be able to provide this free service.

A taxpayer may sign a VITA/TCE-prepared tax return, whether a paper-filed tax return or Form 8879 for an e-filed tax return, only when these validation procedures are complete.

- For a tax return to be electronically filed all taxpayers sign Form 8879 - E-File signature authorization giving permission to have their tax return e-filed.
- **NEW THIS YEAR:** This tax year there is a Customer Portal – If the client has access to a computer or a smart phone it will be a new efficient tool to work with the tax preparer and to be able to digitally sign the tax return. Prerequisites are computer or smart phone to be able to upload documentation. There will be documents explaining how the portal works at our drop-box locations if you are able/would like to use the portal.
- A parent or guardian of a minor child may sign Form 8879 or the tax return for the child by including the statement, “By (parent/guardian’s signature), parent/guardian for minor child”, in the signature section of the tax return. For additional information, see Publication 17, Your Federal Income Tax (For Individuals).

Exception for signing the return for taxpayers known to the site:

- A taxpayer who is filing a joint tax return can be given permission by the site coordinator to take Form 8879 to a missing spouse to secure his or her signature if both taxpayers are known to the site. However, the tax return cannot be e-filed for the taxpayers until both signatures are secured on Form 8879 E-File Signature Authorization pages for both Federal and State filing. **This will be done on a case by case basis with permission from the Site Coordinator only.**
- If the client(s) choose not to return with Form 8879, a paper tax return can be prepared and two copies will be provided to the taxpayers. The taxpayers will be directed where to sign their names on Form 1040. They will also be given the appropriate self-addressed envelopes to the IRS processing center address, and the applicable state(s) tax office(s) for mailing.

Thank you and we look forward to providing another year of successful free tax preparation service. If you have any questions, please feel free to reach out (contact information below).

Leslie Wood,

SEVCA VITA Tax Site Coordinator

lwood@sevca.org 802-722-4575, extension 1603 or cell 802-689-0778