



2023 Beulah Taxpayer Packet and Instructions

All Services are Virtual

WELCOME AND THANK YOU FOR REACHING OUT FOR YOUR TAX NEEDS.
THE MARTIN LUTHER KING SR. COMMUNITY RESOURCES COLLABORATIVE IS A PROUD PARTICIPANT
OF THE IRS VOLUNTEER INCOME TAX ASSISTANCE (VITA) PROGRAM.

STEP 1:

COMPLETE THE INTAKE SURVEY BY CLICKING THIS LINK: [REQUIRED VITA INTAKE SURVEY](#)

STEP 2: Use a PC or Samsung Device

COMPLETE THIS TAXPAYER PACKET

1. TAXPAYER SURVEY
2. FORM 13614-C: INTAKE/INTERVIEW AND QUALITY REVIEW SHEET
3. FORM 14446: VIRTUAL VITA/TCE TAXPAYER CONSENT
4. FORM 15080: CONSENT TO DISCLOSE TAX RETURN INFORMATION TO VITA/TCE TAX PREPARATION SITES

STEP 3:

EMAIL THE PACKET TO vitableulah@gmail.com

STEP 4:

A TAX PREPARER WILL CONTACT YOU BY PHONE OR EMAIL IN 5-7 BUSINESS DAYS
TO SCHEDULE AN APPOINTMENT FOR VIRTUAL TAX PREP SERVICES

STEP 5:

TAX RETURN WILL BE PREPARED FOR THE TAXPAYER

STEP 6:

ALL TAXPAYERS HAVE TO PARTICIPATE IN A QUALITY REVIEW
BEFORE TAX RETURN MAY BE SUBMITTED TO THE IRS

RESOURCES:

FOR MORE INFORMATION OR TO PARTICIPATE IN OUR FREE VIRTUAL FINANCIAL CLASSES AND
TRAINING, PLEASE VISIT OUR WEBSITE AT <https://mlksrccollaborative.everfi-next.net/>

BEULAH VITA TAX PREP INFORMATION PAGE:
[Beulah Baptist Church VITA Site](#)

ALL SERVICES ARE FREE!!!!

WHAT TO HAVE READY

To ensure your tax preparation moves as fast as possible, please be prepared for your session. Here is the list of items you need to have ready. You will be given instructions on how to submit necessary documents to the tax preparer:

REQUIRED DOCUMENTS/ITEMS

1. A valid, official photo identification (you and your spouse, if filing jointly)
2. One of the following for you, your spouse and any other person listed on your return:
 - Social Security Number (SSN) Card
 - Adoption Taxpayer Identification Number (ATIN) card or letter*
 - Individual Taxpayer Identification Number (ITIN) card or letter*

*(IRS assignment letters are acceptable)
3. Previous year's tax return
4. All W-2s for current year
5. Joint returns require both filers to be present to sign the return
6. Voided check or account number card to direct deposit your refund (This is optional, but allows for a quicker refund.)

IF APPLICABLE:

1. Form 1095-A if you purchased health insurance through the marketplace
2. Form 1098-Mortgage Interest, property taxes, closing statement
3. Form 1099-Div, G, INT, Q, R, RRB, SSA, MISC, NEC for current tax year
4. If you had childcare or dependent care expenses, please bring the name, address and Tax ID or SSN/ITIN of the care provider
5. Form 1098-T or 1098-E for educational expense

*******Have any additional items or documents you believe will be important for your tax preparer to have when completing your tax return.*******

4. What are your plans for your tax refund this year? (Check all that apply)

- | | | |
|--|---|---|
| <input type="checkbox"/> I Don't Expect A Refund | <input type="checkbox"/> Pay Car/Truck/Purchase/Lease Automobile | <input type="checkbox"/> Pay for Education/Student Loan/Tuition |
| <input type="checkbox"/> Something Nice/Vacation/Gifts | <input type="checkbox"/> Save It -Bank/Credit Union Savings Account | <input type="checkbox"/> Purchase a Home |
| <input type="checkbox"/> Move To Another City/State | <input type="checkbox"/> Pay Mortgage/Rent | <input type="checkbox"/> Basic Needs (Food/Clothing) |
| <input type="checkbox"/> I Don't Know (undecided) | <input type="checkbox"/> Pay Credit Card/Loans | <input type="checkbox"/> Other: _____ |

5. Do you have any of the following accounts? (Check all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Checking Account | <input type="checkbox"/> Certificate of Deposit (CD) |
| <input type="checkbox"/> Health Savings Account | <input type="checkbox"/> Individual Retirement Account (IRA) |
| <input type="checkbox"/> Basic Savings Account | <input type="checkbox"/> Investment Account |
| <input type="checkbox"/> Savings Bonds/Stock Certificates | <input type="checkbox"/> 401K or 403B |
| <input type="checkbox"/> Individual Development Account (IDA) | |

6. Did you or anyone in your tax household receive/participate in any of the following in 2023? (Check all that apply)

- | | | |
|--|---|--|
| <input type="checkbox"/> Food Stamps | <input type="checkbox"/> Childcare Assistance Program | <input type="checkbox"/> Peach Care |
| <input type="checkbox"/> Head Start/Early Head Start | <input type="checkbox"/> Section 8/Housing Choice Voucher | <input type="checkbox"/> WIC |
| <input type="checkbox"/> TANF | <input type="checkbox"/> Medicaid/Medicare | <input type="checkbox"/> WIOA Training |
| <input type="checkbox"/> SSI/SSDI | <input type="checkbox"/> Re-Entry Training | <input type="checkbox"/> LIHEAP |

7. What is your current living arrangement? (Check only one)

- | | |
|--|--|
| <input type="checkbox"/> Homeless or At-Risk of Homelessness | <input type="checkbox"/> Group Home/Shelter |
| <input type="checkbox"/> Rent/Lease (Home/Apartment/Room) | <input type="checkbox"/> Half-Way House/Transitional Housing |
| <input type="checkbox"/> Own My Home (No Mortgage Payment) | <input type="checkbox"/> Hotel/Motel |
| <input type="checkbox"/> Live with Family/Friend (Free) | <input type="checkbox"/> Camper/Trailer |
| <input type="checkbox"/> Dorm Room/College Campus | <input type="checkbox"/> Live with Family/Friend |

8. Do you or anyone in your tax household have a diagnosed disability? (Check all that apply)

- No Physical Disability Mental Disability

9. Which of the following would you be the most interested in learning about?

- | | | |
|---|--|--|
| <input type="checkbox"/> Affordable rental housing | <input type="checkbox"/> Car Loans | <input type="checkbox"/> Affordable Homeownership |
| <input checked="" type="checkbox"/> Job or career counseling | <input type="checkbox"/> Banking services | <input type="checkbox"/> Foreclosure prevention assistance |
| <input type="checkbox"/> Public Benefits assistance (food stamps) | <input type="checkbox"/> Credit counseling | <input type="checkbox"/> Not answered |

10. What is your highest level of education completed? (Check only one)

- | | |
|--|---|
| <input type="checkbox"/> Less than High School or GED | <input type="checkbox"/> Two-Year Degree (Associates) |
| <input type="checkbox"/> High School | <input type="checkbox"/> Four-Year Degree (Bachelors) |
| <input type="checkbox"/> GED | <input type="checkbox"/> Six-Year Degree (Masters) |
| <input type="checkbox"/> Certificate Program | <input type="checkbox"/> Eight-Year Degree (Doctorate) |
| <input type="checkbox"/> Currently Enrolled in GED Program | <input type="checkbox"/> Currently Enrolled in Two-Year Degree Program |
| <input type="checkbox"/> Currently Enrolled in Certificate Program | <input type="checkbox"/> Currently Enrolled in Four-Year Degree Program |

11. In what area(s) if any, has the Covid-19 pandemic affected your household?

- | | | |
|---|---|---------------------------------------|
| <input type="checkbox"/> Employment | <input type="checkbox"/> Housing | <input type="checkbox"/> School |
| <input type="checkbox"/> Transportation | <input type="checkbox"/> Food/Basic Needs | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Not answered | | |

Virtual VITA/TCE Taxpayer Consent

This form is required when either the Intake/Interview and/or the Quality Review are not conducted in-person 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.

Part I - To be completed by the VITA/TCE site:

Site name

BEULAH BAPTIST CHURCH

Site address (street, city, state, zip code)

2340 Clifton Springs Rd
Decatur, GA 30034

Site identification number (SIDN)

S34010292

Site coordinator name

La-Tarvia Shanks

Site contact name

La-Tarvia Shanks

Site contact telephone number

678-964-5452

This site is using the following Virtual VITA/TCE method(s) to prepare tax returns:

A. Drop Off Site: This site uses a drop off process which includes the site maintaining personally identifiable information (Social Security numbers, Form W-2, etc.) to prepare the tax return at the same site but at a later time. In this process, the taxpayer comes back to the same site for the quality review and/or signing the completed tax return. The site must explain the method it uses to contact the taxpayer if additional information is needed.

Note: Sites where the taxpayer does not leave the site's property, for example waiting in another room or in a vehicle, are NOT considered drop off sites. Since the taxpayer remains at the site, they are not required to complete Form 14446. If the taxpayer leaves their tax documents at the site and then leaves the site's property for any reason, the taxpayer must complete Form 14446.

B. Intake Site: This method includes the taxpayer leaving their personally identifiable information (Social Security numbers, Form W-2 and other documents) at the site in order to prepare and/or quality review the tax return at another location. In this process, the taxpayer's tax return information may be sent to another location for one or more of the following reasons; interviewing the taxpayer, preparing the tax return, or performing a quality review. The taxpayer may come back to the intake site for the quality review or to review and sign the completed tax return.

C. Return Preparation and/or Quality Review Only Site: This site may receive returns from one or more intake sites to prepare and/or quality review returns. This site generally does not take walk-ins or appointments in their location.

D. Combination Site: This site prepares returns for other permanent or temporary intake sites and assists walk-ins and appointments in their location.

E. 100% Virtual VITA/TCE Process: There is no in-person interaction with the taxpayer and any of the VITA/TCE volunteers in this process, during the intake, interview, return preparation, quality review, and signing the tax return. The site must explain the virtual processes and consent. This includes the virtual procedures to send required documents (Social Security numbers, Form W-2 and other documents) through a secured file sharing system to a designated volunteer for review.

Part II: The Site's Process:

Explain how each process will be followed to assist the taxpayer remotely. The questions in parentheses below provide guidance on what to include in the explanation for each process. How will the site manage:

1. Scheduling the appointment (How is the appointment made: by phone, online portal, email, or by other means)

Not appointment site

2. Securing Taxpayer Consent Agreement (How is the 14446 signed, received, and stored)

DocuSign software virtual or in person. Stored in a lock filed cabinet that the Site Coordinator/Back up SC has the key.

3. Performing the Intake Process - securing all documents (How are the taxpayer's supporting documents received, stored and tracked)

The information will be uploaded by taxpayer in a link which is setup on MLK flyer. And for the physical building site, a face to face interaction process and stored in locked file cabinet.

4. Validating taxpayer's authentication - reviewing photo identification and Social Security cards/ITIN letters (What communication channel, either in-person or virtually, is used to validate the taxpayer's identity and which documents are reviewed)

If not upload in TaxSlayer software. Preparer will contact taxpayer on Google Duo, Zoom and Meet in Gmail depending on what the taxpayer is comfortable with. And for the physical building site, intake will verify face to face.

5. Performing the interview with the taxpayer (What communication channel, either in-person or virtually, is used to conduct the interview)

The taxpayer will be called to setup a time to go over the return for verification of ID, intake for accuracy, and any questions the preparer has. On Google Duo, Zoom and Meet in Gmail depending on the what the taxpayer is comfortable with. And for the physical building.

6. Preparing the tax return (Where is the tax return prepared and how are documents accessed by the preparer)

The preparer will prepare the return on TaxSlayer and contact the taxpayer for missing information. The taxpayer unload and email the documents to site email address. The Site Coordinator will print the documents on Saturday to be assigned to preparer.

7. Communicating with the taxpayer (Site must explain the method(s) it uses to contact the taxpayer if additional information is needed)

During the week or on after hours the taxpayer will be called by Site Coordinator/Back up Coordinator by phone. The taxpayer is given the site email address to send any documents and/or leave response.

8. Performing the quality review (Where is the tax return reviewed and how are documents accessed by the reviewer)

The taxpayer will be called to setup a time to go over the return for accuracy. On Google Duo, Zoom and Meet in G-mail depending on the what the taxpayer is comfortable with, virtually. And for the physical building, Quality Review will be face to face.

9. Sharing the completed return (What communication channel, in-person or virtually, is used to share the completed return and how does the volunteer and/or taxpayer access the completed return)

On Google Duo, Zoom and Meet in G-mail depending on the what the taxpayer is comfortable with, virtually. And Google Drive for sending the returns back. And for the physical building, Quality Review will be face to face with taxpayer to go over the return and answer any questions.

10. Signing the return (Does taxpayer sign the return in-person or electronically and if electronically, which software is used to sign the return)

DocuSign system/TaxSlayerPro signature

11. E-filing the tax return (When is the return e-filed: immediately or at the end of the day)

Through TaxSlayerPro software immediately after Quality Review. Or the next day if its closing time.

Page three of this form will be maintained at the site with all other required documents.

Part III: Taxpayer Consents:

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 agree to use this site's Virtual VITA/TCE Process Yes No

Printed name		Printed name (spouse if married filing joint)	
Date of birth	Date	Date of birth	Date
Telephone number		Telephone number	
Email address		Email address	
Signature (electronic)		Signature (electronic)	
OR		OR	
Signature (type/print)		Signature (type/print)	

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

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

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

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

