Tax Site Greeter FAQ
2019 Tax Season

1. What do I need to do my taxes?
    - Photo ID for the primary and secondary taxpayer, SSN/ITIN original or copy for everyone on the return, and all 2018 tax documents

2. Where do I sign in?
    - Enter your name on this iPad, grab a clipboard, and take a seat. Please complete the intake paperwork on the clipboard, and one of our staff members will call your name.
    - Note to the greeter: the smaller tax sites use a paper sign-in sheet. The two community financial centers use an electronic sign-in software.

3. How long will tax prep take?
    - We don't know for sure, since wait times are based on how many people are here and how long each of their returns takes (more complicated returns take longer). You should plan to be here at least an hour, but it could take 2-3 hours.
    - Here's how the process works: you fill out the clipboard paperwork, do an interview with our intake staff to make sure you have everything you need, meet with a tax preparer, and meet with a quality reviewer who will check to make sure your return is accurate.
    - If you want to save time, you can use our drop off program.

4. What is the drop off program?
    - You can just do the intake interview today, and then return to pick up your return. You will still need to complete the intake paperwork and wait for an intake staff member to interview you. But you won't need to stay while the tax return is being prepared. After today, someone will call you when your return is ready, which will be in about one week.

5. Can I get a copy of my tax return from a prior year?
    - Yes, we can print them for you. We need you to show us your photo ID and write down your social security number.
    - We only print a copy of returns that are marked complete in our system. These can be returns that were e-filed or completed to be mailed as paper returns.

6. How can I make an appointment for taxes?
    - We only offer appointments for our tax site at Round Rock Public Library. All of our other sites, including this one, see people on a walk-in basis. You can schedule an appointment by calling 211 or going to www.communitytaxcenters.org.
    - We do have appointments available at the Community Financial Center South location for our Deaf or Hard of Hearing clients who would like an ASL interpreter.

7. When can I set up an appointment for the Out of Scope program, which does tax preparation for clients who have returns that the regular tax site isn't allowed to do?
    - A tax staff member can fill out the online referral form for you.

8. How can I get my W-2?
    - Your employer should have mailed your W-2 to you or made it available online. (You can reach out to your employer to get another copy of your W-2.) If you are unsuccessful in getting your W-2 from your employer, you should contact the IRS to request your W-2. You can also request a transcript online (https://www.irs.gov/individuals/get-transcript).

9. How can I set up a payment plan for IRS?
    - You can call IRS or one of our amazing tax volunteers can help with that request. You will need to wait in line for a tax preparer to become available to meet with you.

10. How do I make an appointment for another program (Financial Coaching, College Hub, Insure Central Texas)?
    - When Navigator/Program Staff are there: They can help schedule an appointment.
    - When Navigator/Program Staff are not there: Hand them a program flyer that has the phone number and email address for the program.