



Tax Site Greeter FAQ 2019 Year Round

1. What do I need to do my taxes?

- Valid, original photo ID for the primary and secondary taxpayer, SSN/ITIN original or copy for everyone on the return, and all relevant tax documents for the tax year for which you need to prepare a return.

2. Where do I sign in?

- If you're here for taxes, please sign in on this paper sign-in sheet. Please complete the intake paperwork on the clipboard, and one of our staff members will call your name.
- If you're here to apply for or renew an ITIN, please sign in on the ITIN-specific sign-in sheet. Please have a seat and the staff member seeing clients will come out to talk with you shortly.

If someone needs to prepare a tax return and apply for/renew an ITIN, have them sign in on both sign-in sheets.

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 1.5-2 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 do the intake interview today and then return on another day 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 previous year tax return?

- 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 can schedule an appointment for you, or you can schedule by calling 211 or going to www.communitytaxcenters.org. An appointment is not required for tax preparation.
- If you are Deaf or Hard of Hearing and need an appointment with an ASL interpreter, we will make you an appointment and notify Tax Program Manager Janet, who will arrange an interpreter for the appointment.

7. When can I set up an appointment for the Out of Scope program, which does tax preparation for clients who have more complicated returns that the regular tax site isn't allowed to do?

- A tax staff member can fill out the online referral form for you. You'll be contacted within a week to schedule the appointment.

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)?

- We can help schedule an appointment, or we can provide you with a program flyer that has the phone number and email address for the program.