

CTC Resources Scavenger Hunt

CTC Resources (“Community Tax Centers”) is the website that contains information to support all aspects of the Tax Help Program, including tax law, program policies, intake documents, volunteer resources, and more.

Use www.CTCresources.com to answer the questions below. Be sure to cite the document or link on CTC Resources that gave you the answer!

A taxpayer presents Form 1099-C for cancellation of debt for a vehicle. Can we prepare the tax return?

Answer and Source:

Name TWO circumstances that make a Schedule C out of scope for the Tax Help VITA Program?

Answers and Source:

A taxpayer comes to the tax center and wants to file as Married Filing Jointly but their spouse lives in Mexico. Can we prepare the tax return? What kind of consent do we need to prepare the tax return?

Answer and Source:

Which documents will the Tax Help Program accept to verify a taxpayer’s SSN?

Answer and Source:

What does the code “W” signify in Box 12 of Form W-2? What additional information is needed from the taxpayer with this code on a W-2?

Answer and Source:

Will a client receiving Supplemental Security Income (SSI) benefits from the Social Security Administration receive a tax form detailing the benefits received? Where are the benefits entered on the client’s tax return?

Answer and Source:

What certification level is required to prepare a tax return that includes Form 1099-R where Box 2a is empty and Box 2b “Taxable Amount Not Determined” is checked? What information is needed to use the “Simplified Method” to determine the taxable amount?

Answer and Source:

Will the Tax Program prepare a Married Filing Separately tax return for a client who lived with their spouse during the tax year but prefers to file separately? Will a Married Filing Separately tax return be e-filed by the Tax Program?

Answers and Source:

A taxpayer presents Form 1095-A where there are individuals listed on the 1095-A that will not be included on the taxpayer’s tax return. This tax return is out of scope for VITA. Can Special Tax Services (STS) prepare the return?

Answer and Source:

An ITIN holder is having their 2024 tax return prepared. Their ITIN has middle digits of 94 and was issued in May of 2013. The taxpayer has not renewed the ITIN since then and has filed every year since receiving the ITIN. Does the ITIN need to be renewed when filing a 2024 return?

Answer and Source:

You notice a taxpayer has Form W-2 that includes wage and tax withholding information for a state other than Texas. Must the state tax return be prepared by the Drop Off program?

Answer and Source:

Are self-employed taxpayers eligible to deduct miles from their home to their place of business and back? What are these miles called?

Answer and Source:

Answer these True or False Questions

We can e-file a 2021 and older tax returns.

T or F

We can prepare a tax return with a business loss.

T or F

Veterans are exempt from income eligibility limits.

T or F

An "Injured Spouse" is a taxpayer who incurred physical injury during the tax year and is eligible for a special tax credit.

T of F

A tax return with Form 1098-T where Box 4 or Box 6 contains an entry is always out of scope.

T of F

The VITA Tax Help Program will prepare tax returns for taxpayers with Form 1099-B showing cryptocurrency transactions during the tax year.

T of F