

QUICK GUIDE TO DROP-OFF INTAKE

(both spouses if MFJ, or refer to virtual at getyourrefund.org/fc)

1. Photocopies of ID/SSN

2. Form 13614-C INTAKE/INTERVIEW

3. Virtual DO Consent (SIGNED)

4. Drop-off Intake Checklist (save to PDF)

5. Additional Options:

- Self Employment Worksheet**
- Education Credit Checklist**

6. Scan Documents

7. Transfer to Hub:

- a. Create Hub Ticket.**
- b. Add ticket Modifiers to Preferred Name. (over →)**
- c. Upload scanned documents.**
- d. Move ticket to Tax Prep: Ready for Prep.**
- e. Assign ticket to “DO MANAGER”**

Modifiers

+EdCr	(Education Credit) The tax year includes an education credit.
+IP PIN	The taxpayer has been issued an IP PIN by the IRS.
+AMEND	(Amendment) The tax year is for an amendment .
+MFS	(Married Filing Separately) The tax year will be filed as MFS.
+ITIN	The taxpayer or a tax household member is applying for or renewing an ITIN.
+MIL	(Military) The tax year requires Military certification (or includes rental income).
+INT	(International) The tax year requires International certification.
+NR	(Non-Resident) Taxpayers with an F, J, M, or Q visa or Form 1042-S who are referred to the FSS program.
+OOS	(Out of Scope) The return is out of scope for VITA. The taxpayer may have been referred to STS or another preparer. The ticket should be moved to Final Steps: Not Filing.
+ASL	(American Sign Language) The taxpayer requires ASL interpretation.
+state-abbreviation	The tax year includes a tax return for the designated state, eg, +NY, +OK.
+PAPER	The tax return must be paper for any qualifying reason.
+IRS LTR	(IRS letter) The taxpayer has an IRS letter that may impact the tax return or require assistance from the Tax Help Program.
+NOTES	For Drop-Off tickets and others when there are especially critical notes to read before preparation, quality review, or client review.
+INCOMP	(Incomplete) When the Intake is incomplete. Incomplete intakes for these programs are to be used sparingly and at the discretion of the Site Manager.
+SIG ONLY	(Signature Only) For Drop-Off tickets <u>when a client review has been completed</u> over the phone and only the client signature is needed on Form 8879 and any state e-file authorizations for e-file tax returns.
+site-name	(Originating Site) For Drop-Off tickets, the "home" or originating site of a newly-created ticket, eg, +GW, +NO, +TR, etc..
This modifier is not in use for the TY22 season.	
+STS	(Special Tax Services) The tax year has been referred to STS.