Policy: Who Must be Present During Intake and Tax Preparation?

We verify the identity of both taxpayers at each step of the process: intake, preparation, and quality review.

	Policy	**Exceptions & Guidance**
For **On-Site** Tax Returns	The taxpayer(s) must be present in person at every stage of the process. If MFJ, both spouses must be present at all stages of the process.	The primary taxpayer or spouse can step away during any part of the process without violating our policy **as long as both spouses are both present at the beginning of each step and their identity is verified**. We want to accommodate families as the tax preparation process can last several hours. In cases where one spouse is not present at the Tax Center at all, see Policy & Guidance: When One Spouse is Not Present for guidance.
For In Person **Drop-Off** Intake	The taxpayer must be present in person for the Intake interview. If MFJ, both spouses must be present.	In cases where one spouse is not present at the Tax Center at all, see Policy & Guidance: When One Spouse is Not Present for guidance. The taxpayers may be referred to the Drop-Off program for virtual intake through the Hub: getyourrefund.org/fc-fc