What will my tax visit look like?

1. First, you will be asked to complete an Intake and Interview sheet. The information on this sheet gives the preparer information that is required to complete your return, and also helps them ensure that your return falls within the scope of VITA. This form should be filled out completely and accurately to ensure that your return is prepared correctly.
2. At a site, you will sit with the volunteer while they prepare your return so that you can answer any questions about the information or paperwork you have provided. This also gives you the opportunity to ask the volunteer questions about your return.
3. After your return is completed, it will go through a Quality Review process. This helps to ensure that the return is error-free when it is filed. If the site is busy, you may have to wait a short time until a Quality Reviewer is available.
4. Once your return has been reviewed, a copy will be printed for your records. A volunteer will sit with you to give you your copy of both Federal and State returns along with any additional tax-related paperwork you brought in. At this time, you will have a final opportunity to ask questions regarding your return before signing an authorization form that allows the site to e-file your return for you. At this point, you are finished at the site.
5. After your return is e-filed, it will be processed by the IRS computers. If there are any errors when the file is processed – such as a misspelled name – the site coordinator will contact you to resolve the error, and then re-file the return.