

Options for Free Tax Preparation Assistance



Types of Options

- ◆ Alternative Filing Method Sites
- ◆ Assisted Self Service Sites
- ◆ Mobile Sites

Alternative Filing Method Sites

- ◆ Preferred method is traditional free tax preparation site such as VITA
- ◆ Option to overcome challenges for traditional free tax preparation sites:
 - Lack of sufficient certified volunteers
 - Lack of computers, equipment and/or space

Alternative Filing Method Sites

- ◆ Option to reach taxpayers unable to visit a “traditional” free tax preparation site or without access to free tax return preparation services in their area.

Alternative Filing Method Sites

- ◆ Two Basic Components to connect clients to free tax preparation services in different locations
 - Intake Site
 - and
 - Preparation Site

Alternative Filing Method Sites

Intake Sites

- ◆ Usually located in geographically remote areas
- ◆ Returns are not prepared at Intake Site
- ◆ A volunteer reviews the taxpayer's proof of identify, source documents and starts the return preparation process.
- ◆ Volunteer provides copies of the taxpayer's documents to the Preparation Site via secure fax, email, mail, or other method.

Alternative Filing Method Sites

Preparation Sites

- ◆ A certified volunteer:
 - receives the documentation
 - communicates directly with taxpayer via phone, internet, Skype, etc. and
 - prepares the return
- ◆ Return is sent back to taxpayer for signature.
- ◆ Upon receipt of signed return, it is e-filed.

Alternative Filing Method Sites

Benefits

- ◆ Connects more taxpayers to free tax preparation services through intake and preparation sites partnership.
- ◆ Provides additional intake locations for people who are unable to travel to traditional free tax preparation sites.
- ◆ Sites get credit for returns prepared.

Alternative Filing Method Sites

- ◆ More information is available
 - Request a DVD from IRS SPEC contact or
 - Access through this link:
<http://preview.irsvideos.gov/Individual/education/AlternativeFilingMethods>

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Assisted Self-Service Sites

General information

- ◆ Taxpayer prepares their own return using software
- ◆ At least one volunteer certified at Basic Level to provide assistance with software at site
- ◆ Software interview process eliminates requirement for intake and quality review process of traditional free tax preparation sites

Assisted Self-Service Sites

- ◆ Potential Locations include:
 - ◆ Retail Space in Mall
 - ◆ College Campus (coordinate with FAFSA)
 - ◆ Co-located with a traditional free tax preparation site (VITA/TCE)
 - ◆ Located at non-profit organization with computer lab
 - ◆ Employer location (employee benefit)

Assisted Self-Service Sites

Benefits

- ◆ Reduce lines at peak times
- ◆ Increase options for taxpayers
- ◆ Sites get credit for returns prepared
- ◆ Taxpayers may need a little help at beginning, but builds confidence to file on their own next year.

Assisted Self-Service Sites

FAST (Free Assisted Self-Service Tax Preparation)

- ◆ Internet, computer, and email account required
- ◆ 3 software programs in coordination with the Free File Alliance
 - H&R Block
 - Turbo Tax
 - Tax Slayer
- ◆ Site links to a IRS SPEC provided specific URL for each provider to access the software and receive return counts

Assisted Self-Service Site

Other Options

- ◆ Beehive/One Economy
 - Walmart
 - Mini-grants available through One Economy
- ◆ I-CAN! E-File
 - Legal Aid of Orange County

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Mobile Sites

General Information

- ◆ Option to take the free tax preparation software to other locations than traditional sites
 - Grocery stores
 - Shopping malls
 - Food banks
- ◆ Laptop, internet, printer, certified volunteer required

Mobile Sites

Beehive/One Economy Mobile Van

- Beehive Mobile Van visits an area for 2 weeks during filing season as part of a grant program with local United Way.
- Local United Way office develops the schedule for duration of visit.
- One certified volunteer travels with van and laptops. Local United Way also provides a certified volunteer

For more information on Options for Free Tax Preparation Assistance in Washington State :

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