Jennings County
UNITED WAY
707 N State St, North Vernon, IN 47265
jcunitedway.org

VITA PROGRAM CLIENT INFORMATION

Instructions

1. **Prepare-** Remove documents from envelopes, remove staples or paper clips and place in envelope:
   - ☐ ALL of your tax documents
   - ☐ Photo ID for taxpayer (and spouse)
   - ☐ Social security cards for everyone on the tax return
   - ☐ Voided check for direct deposit/ debit (bank account must be in taxpayer(s) name(s)
   - ☐ All three completed Intake forms:
     - 13614-C Intake/Interview & Quality Review Sheet
     - 14446 Virtual VITA Consent form
     - Local Intake form (page 2 of this document)
2. **Bring your envelope for your intake interview.**
   - We will review your forms and documents & ask questions to clarify your information.
   - We will scan everything and save the files on a USB drive, then upload the file(s).
   - The envelope, all documents and the USB drive will be returned to you.
   - We recommend that you save your final signed tax return on the USB drive, too!

What happens next

- **Preparation-** A certified volunteer, onsite or remote, will prepare your return and ask or call with questions.
- Any documents must be sent ONLY in the Customer Portal. (Click/tap "My files" to upload) or brought in person. For your protection do not email, or text tax documents, and **do not leave them in the overnight drop.**
- **Quality Review-** We will call you for the required review (unless you are waiting). If you set up your customer portal, you can review over the phone, otherwise you will need to make an appointment to come in.
- **Save the signed tax return to your USB drive.** Your return will be available in your portal for a few months.
- **E-File-** After the return is signed we will e-file. When the e-file is accepted, we delete your scanned documents.
- **Status of your return-** You can check the status of your return in your portal.

Customer Portal

The IRS Secure Customer Portal- The Portal is an easy, free and secure way to share files, exchange messages and e-sign documents from a phone, tablet or computer. Download a User Guide on jcunitedway.org

- **Check your email.** The email comes from "TaxStatusNow" after your return is started. Click/tap the link.
- **Register your account.** Create your own username and password. The email, phone #, last name and last four of your social security number must match the **primary taxpayer** on your tax return.
- **Verify.** Choose text or email. **Keep the window open.** Check text/email to get the six-digit code and put it into the box in the open window. If you close the window, you will need a new code. Only the last code sent is valid.
- **Bookmark the link to your portal** for easy access. You can also find the link on jcunitedway.org
- **To view** your return in your Customer Portal click/tap "Files shared with me".
- **To sign** electronically in your Portal click/tap "Files shared with me", click/tap "Add signature", sign in the box & "save". Then below, near where you viewed the return, click/tap "Sign" to sign the return.
- **Questions?** Click "Messages" to contact us in your Secure Customer Portal.

Taxpayers are responsible for the information on their tax return and sign under the penalty of perjury.

Jennings County UNITED WAY
707 N State St, North Vernon, IN 47265
jcunitedway.org

VITA PROGRAM LOCAL INTAKE FORM

PRINT CLEARLY- This information is used in your tax return and Customer Portal account.		
Taxpayer email address:	@	
Spouse email address:	@	
Taxpayer cell phone:	( ) –	☐landline /no cell phone
Spouse cell phone:	( ) –	☐landline /no cell phone

Taxpayer as of 1/1/2024:	☐ **Lived** in Jennings County ☐ **Worked** in Jennings Co.	☐Other: ☐Other:
Spouse as of 1/1/2024:	☐ **Lived** in Jennings County ☐ **Worked** in Jennings Co.	☐Other: ☐Other:

Do you rent or own your primary home?

☐ **OWN** in 2024: **Property tax** paid in 2024: $ # of Months:	☐ **RENT** in 2024: **Rent** paid in 2024: $ # of Months:	**Landlord's Name & Address (required):** Name Address City, State Zip ☐ dwelling is NOT subject to Indiana property tax.

Retired?	**Distribution start date(s)** ☐Taxpayer: ☐Spouse:	**Military?**	☐ Military Retired Pay Notes: W2 w/ "Q" box 12 is Out of Scope - Refer to a Military VITA Program

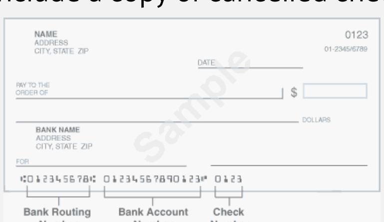
HSA?	☐Single Plan ☐Family Plan	☐Total spent from HSA: ☐Expenses 100% medical	☐Amount not qualified: ☐Additional Deposits:

IP PIN:	☐Taxpayer: ☐Spouse:	**Other**	☐Parochial School or homeschool ☐Contribute to a 529 Plan

Direct deposit /debit

Account must be in the taxpayer's name

Include a copy of cancelled check **OR** routing and account numbers:



Bank Name:
Account Name:
Routing#
Account #

I verify this account is in my name and accept sole responsibility for account information.

Signature

If you owe and want direct debit: What date? ______________________(prior to 4/15/2025)

Required Quality Review You must review and sign your return before we e-file it. We will call you when your return is ready. You will need an appointment or set up your Customer Portal to review over the phone.