





Regional Tax Assistance Collaborative- VITA DROP OFF PLAN 2018

The below listed sites will use Drop Off method on a normal or emergency backup method.

VITA Drop Off service is when you retain the tax filers' information to perform tax preparation at another date. This can be a regular part of your services or can be used on an emergency basis for weather, software or staffing emergencies.

- 1) Each taxpayer using the drop-off method will complete an intake sheet, sign the Form 14446, and leave his/her tax documents.
- 2) Tax documents will be stored in a secure location.
- 3) The taxpayer will make an appointment or confirm date/time to return to complete the tax process.
- 4) A certified volunteer will conduct the intake interview with the taxpayer, either onsite or by telephone.
- 5) A certified volunteer will complete the tax return.
- 6) The taxpayer will return to the site at a designated time. {optional: His/her name will appear first on the list so that he/she receives priority service}.
- 7) When the taxpayer returns to the site, a certified volunteer (but not the volunteer who prepared the tax return) will conduct a quality review with the taxpayer and provide a printed tax return.
- 8) The site coordinator will e-file the return (unless paper filing is required)

Site Name	Site Coordinator	Use DropOff in Normal Operations ✓	Use DropOff as Emergency Backup ✓