Form **13614-C**

Department of the Treasury - Internal Revenue Service

(October 2020)

Intake/Interview & Quality Review Sheet

OMB Number 1545-1964

You will need:

- Tax Information such as Forms W-2, 1099, 1098, 1095.
- Social security cards or ITIN letters for all persons on your tax return.
- Picture ID (such as valid driver's license) for you and your spouse.

Part I – Your Personal Information (If you are filing a joint return, enter your names in the same order as last year's return)

• Please complete pages 1-4 of this form.

• You are responsible for the information on your return. Please provide complete and accurate information.

• If you have questions, please ask the IRS-certified volunteer preparer.

Volunteers are trained to provide high quality service and uphold the highest ethical standards. To report unethical behavior to the IRS, email us at wi.voltax@irs.gov

1. Your first name		M.I.	Last na	Last name			Da	Daytime telephone number			Are you a U.S. citizen? ☐ Yes ☐ No		
2. Your spouse's first name			Last na	Last name			Da	Daytime telephone number			Is your spouse a U.S. citizen? ☐ Yes ☐ No		
3. Mailing address		-				Apt #	City	<u>'</u>			State	ZI	P code
4. Your Date of Birth	5. Your job tit	tle			_ast year, Totally an	•	u: nently disa	abled 🗌	Yes □ N		-time stud ally blind	ent	_
7. Your spouse's Date of Birth	8. Your spou			b. ⁻	Totally an	d permai	ır spouse: nently disa		Yes □ N		-time stud ally blind	ent	_
10. Can anyone claim you or yo					☐ No	☐ Uns							
11. Have you, your spouse, or	•			ated ide	ntity theft	or been	issued an	Identity Pro	otection PIN	l?		☐ Y	es 🗌 No
Part II - Marital Status and													
1. As of December 31, 2020, what was your marital status? Never Married (This includes registered domestic partnerships, civil unions, or other formal relationships under state law a. If Yes, Did you get married in 2020? Yes No							0						
	□ Div	orced		-	e with yo al decree	•	e during a	ny part of th	ne last six m	nonths of 20	020?	Yes \square N	0
	_		_				ca dacraa						
	☐ Legally Separated Date of separate maintenance decree☐ Widowed Year of spouse's death												
2. List the names below of: • everyone who lived with you last year (other than your spouse) If additional space is needed check here □ and list on page 3													
anyone you supported but	did not live witl								To be co	mpleted by	y a Certifi		er Preparer
	(mm/dd/yy)	to you (for example:		US Citizen (yes/no)	of US, Canada,	Single or Married as of 12/31/20 (S/M)		Totally and Permanently Disabled (yes/no)	Is this person a qualifying child/relative of any other person? (yes/no)	person provide more than 50% of his/	have less than \$4,300 of income?	Did the taxpayer(s) provide more than 50% of support for this person? (yes/no/n/a)	Did the taxpayer(s) pay more than half the cost of maintaining a home for this person?
(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	,	(yes,no,n/a)		,	(yes/no)
Catalog Number 52121E					MANANA/ irs	e dov					Eorn	1361 <i>4</i> _C	(Pov. 10.2020)

CHECK	appi	opilate be	ox for each question in each section						
Yes	No	Unsure	Part III - Income - Last Year, Did You (or Your Spouse) Receive						
			1. (B) Wages or Salary? (Form W-2) If yes, how many jobs did you have last year?						
			2. (A) Tip Income?						
			3. (B) Scholarships? (Forms W-2, 1098-T)						
			4. (B) Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)						
			5. (B) Refund of state/local income taxes? (Form 1099-G)						
			6. (B) Alimony income or separate maintenance payments?						
			7. (A) Self-Employment income? (Form 1099-MISC, 1099-NEC, cash, virtual currency, or other property or services)						
			8. (A) Cash/check/virtual currency payments, or other property or services for any work performed not reported on Forms W-2 or 1099?						
			9. (A) Income (or loss) from the sale or exchange of Stocks, Bonds, Virtual Currency or Real Estate? (including your home) (Forms 1099-S,1099-B)						
			10. (B) Disability income? (such as payments from insurance, or workers compensation) (Forms 1099-R, W-2)						
			11. (A) Retirement income or payments from Pensions. Annuities, and or IRA? (Form 1099-R)						
			12. (B) Unemployment Compensation? (Form 1099G)						
			13. (B) Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)						
			14. (M) Income (or loss) from Rental Property?						
			15. (B) Other income? (gambling, lottery, prizes, awards, jury duty, virtual currency, Sch K-1, royalties, foreign income, other property or services,						
			etc.) Specify						
Yes	No	Unsure	Part IV – Expenses – Last Year, Did You <i>(or Your Spouse)</i> Pay						
			1. (B) Alimony or separate maintenance payments? If yes, do you have the recipient's SSN? Yes No						
			2. Contributions to a retirement account? IRA (A)						
			3. (B) College or post secondary educational expenses for yourself, spouse or dependents? (Form 1098-T)						
			4. Any of the following? (A) Medical & Dental (including insurance premiums) (A) Mortgage Interest (Form 1098)						
			☐ (A) Taxes (State, Real Estate, Personal Property, Sales) ☐ (B) Charitable Contributions						
			5. (B) Child or dependent care expenses such as daycare?						
			6. (B) For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.?						
			7. (A) Expenses related to self-employment income or any other income you received?						
			8. (B) Student loan interest? (Form 1098-E)						
Yes	No	Unsure	Part V – Life Events – Last Year, Did You (or Your Spouse)						
			1. (A) Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in box 12)						
			2. (A) Have credit card or mortgage debt cancelled/forgiven by a lender or have a home foreclosure? (Forms 1099-C, 1099-A)						
			3. (A) Adopt a child?						
			4. (B) Have Earned Income Credit, Child Tax Credit or American Opportunity Credit disallowed in a prior year? If yes, for which tax year?						
			5. (A) Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)						
			6. (A) Receive the First Time Homebuyers Credit in 2008?						
			7. (B) Make estimated tax payments or apply last year's refund to this year's tax? If so how much?						
			8. (A) File a federal return last year containing a "capital loss carryover" on Form 1040 Schedule D?						
			9. (A) Have health coverage through the Marketplace (Exchange)? [Provide Form 1095-A]						
			10. (B) Receive an Economic Impact Payment (stimulus) in 2020?						

Additional Information and Questions Related to the Preparation of Your Return							
1. Provide an email address (optional) (this email address will not be used for contacts from the Internal Revenue S	Service)						
2. Presidential Election Campaign Fund (If you check a box, your tax or refund will not change)							
Check here if you, or your spouse if filing jointly, want \$3 to go to this fund ☐ You ☐ Spouse							
3. If you are due a refund, would you like: a. Direct deposit yes No No Direct deposit No Direct deposit No No Direct deposit No Dire	nds c. To split your refund between different accounts Yes No						
4. If you have a balance due, would you like to make a payment directly from your bank account?	☐ No						
5. Did you live in an area that was declared a Federal disaster area? ☐ Yes ☐ No ☐ If yes, where?							
6. Did you, or your spouse if filing jointly, receive a letter from the IRS?							
Many free tax preparation sites operate by receiving grant money or other federal financial assistance. The this site to apply for these grants or to support continued receipt of financial funding. Your answer will be are optional.	<u> </u>						
7. Would you say you can carry on a conversation in English, both understanding & speaking? Very well V	Vell ☐ Not well ☐ Not at all ☐ Prefer not to answer						
8. Would you say you can read a newspaper or book in English? ☐ Very well ☐ Well ☐ N	ot well						
9. Do you or any member of your household have a disability? ☐ Yes ☐ No ☐ P	refer not to answer						
10. Are you or your spouse a Veteran from the U.S. Armed Forces? ☐ Yes ☐ No ☐ P 11. Your race?	refer not to answer						
☐ American Indian or Alaska Native ☐ Asian ☐ Black or African American ☐ Native Hawaiian or other I	Pacific Islander						
12. Your spouse's race?							
☐ American Indian or Alaska Native ☐ Asian ☐ Black or African American ☐ Native Hawaiian or other I	Pacific Islander						
☐ No spouse							
13. Your ethnicity? ☐ Hispanic or Latino ☐ Not Hispanic or Latino ☐ Prefer not to an	nswer						
14. Your spouse's ethnicity? ☐ Hispanic or Latino ☐ Not Hispanic or Latino ☐ Prefer not to an	swer						
Additional comments							
Privacy Act and Paperwork Reduction Act Notice	Privacy Act and Paperwork Reduction Act Notice						

The Privacy Act of 1974 requires that when we ask for information we tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it, and whether your response is voluntary, required to obtain a benefit, or mandatory. Our legal right to ask for information is 5 U.S.C. 301. We are asking for this information to assist us in contacting you relative to your interest and/or participation in the IRS volunteer income tax preparation and outreach programs. The information you provide may be furnished to others who coordinate activities and staffing at volunteer return preparation sites or outreach activities. The information may also be used to establish effective controls, send correspondence and recognize volunteers. Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to use your assistance in these programs. The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224

Form 15080 (EN-SP)

(July 2020)

Department of the Treasury - Internal Revenue Service

Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites

Federal Disclosure:

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Terms

Global Carry Forward of data allows TaxSlayer LLC, the provider of the VITA/TCE tax software, to make your tax return information available to ANY volunteer site participating in the IRS's VITA/TCE program that you select to prepare a tax return in the next filing season. This means you will be able to visit any volunteer site using TaxSlayer next year and have your tax return populate with your current year data, regardless of where you filed your tax return this year. This consent is valid through November 12, 2022.

The tax return information that will be disclosed includes, but is not limited to, demographic, financial and other personally identifiable information, about you, your tax return and your sources of income, which was input into the tax preparation software for the purpose of preparing your tax return. This information includes your name, address, date of birth, phone number, SSN, filing status, occupation, employer's name and address, and the amounts and sources of income, deductions and credits that were claimed on, or contained within, your tax return. The tax return information that will be disclosed also includes the name, SSN, date of birth, and relationship of any dependents that were claimed on your tax return.

You do not need to provide consent for the VITA/TCE partner preparing your tax return this year. Global Carry Forward will assist you only if you visit a different VITA or TCE partner next year that uses TaxSlayer.

Limitation on the Duration of Consent: I/we, the taxpayer, do not wish to limit the duration of the consent of the disclosure of tax return information to a date earlier than presented above (November 12, 2022). If I/we wish to limit the duration of the consent of the disclosure to an earlier date, I/we will deny consent.

Limitation on the Scope of Disclosure: I/we, the taxpayer, do not wish to limit the scope of the disclosure of tax return information further than presented above. If I/we wish to limit the scope of the disclosure of tax return information further than presented above, I/we will deny consent.

Consent:

I/we, the taxpayer, have read the above information.

I/we hereby consent to the disclosure of tax return information described in the Global Carry Forward terms above and allow the tax return preparer to enter a PIN in the tax preparation software on my behalf to verify that I/we consent to the terms of this disclosure.

Primary taxpayer printed name and signature	Date	
Secondary taxpayer printed name and signature	Date	

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov.

Form **14446**

Department of the Treasury - Internal Revenue Service

(October 2020)

Virtual VITA/TCE Taxpayer Consent

OMB Number 1545-2222

This form is required whenever the taxpayer's tax return is completed and/or quality reviewed in a non-face-to-face environment. The site must explain to the taxpayer the process this site will use to prepare the taxpayer's return. If applicable, taxpayers must also be advised of all procedures and the associated risk if their data will be transferred from one site location to another site location.

Part I - To be completed by the VITA/TCE site:						
Site name NeighborWorks Umpqua - Coastal						
Site address (street, city, state, zip code) 1992 Sherman Ave North Bend, OR 97459						
Site identification number (SIDN)	Site coordinator name					
S38012103	Daniel McAvoy					
Site contact name	Site contact telephone number					
Daniel McAvoy	887-527-5630					
This site is using the following Virtual VITA/TCE method(s) to	prepare your tax return:					
security numbers, Form W-2, etc.) to prepare the tax return at t	tides the site maintaining personal identifiable information (social he same site but at a later time. In this process, you will come back mpleted tax return. The site will explain the method it will use to nd/or quality review the tax return.					
B. Intake Site: This method includes the taxpayer leaving their personal identifiable information (social security numbers, Form W-2 and other documents) at the site in order to prepare and/or quality review the tax return at another location. In this process, the taxpayer's tax return information may be sent to another location for one or more of the following reasons; interviewing the taxpayer, preparing the tax return, or performing a quality review. The taxpayer may come back to the intake site for the quality review or to review and sign the completed tax return.						
C. <u>Return Preparation and/or Quality Review Only Site:</u> This site may receive returns from one or more intake sites to prepare and/or quality review returns. This site generally does not take walk-in or appointments from other taxpayers in their location.						
D. <u>Combination Site:</u> This site prepares returns for other permanent or temporary intake sites as well as assisting walk in and/or appointment only taxpayers within their location.						
TCE volunteers during the intake, interview, return preparate explained the full process and is required to consent to step	on face-to-face interactions with the taxpayer and any of the VITA/ tion, quality review, and signing the tax return. The taxpayer will be b-by-step process used by the site. This includes the virtual umbers, Form W-2 and other documents) through a secured file					

Part II: The Sites Process:

Explain how each process will be followed to assist taxpayers remotely. How will the site manage:

1. Scheduling the appointment

Taxpayers will first complete the 13614-C, and this form 14446. Taxpayers can obtain these documents at the NeighborWorks Umpqua VITA of fice or online at getyourrefund.org. Taxpayer will call into 887-527-5630 where they will overview a questionnaire. Once the volunteer confirms that the taxpayer has all needed documents they will set up an appointment to come to a scan site.

2. Securing Taxpayer Consent Agreement

This consent agreement will be scanned in with all of their documents at the scan appointment.

3. Performing the Intake Process (secure all documents)

Taxpayers will scan all of their tax documents at the scan site at their scan appointment.

4. Validating taxpayer's authentication (Reviewing photo identification & Social Security Cards/ITINS)

Taxpayer must bring valid photo ID for the taxpayer to the appointment. Additionally the taxpayer must bring social security cards or ITIN notices for all household members.

5. Performing the interview with the taxpayer(s)

By calling into 877-527-5630 taxpayers will conduct an interview with a volunteer. This volunteer will go through the 13614-C and an additional questionnaire to ensure the taxpayer has all relevant information for the scan appointment.

6. Preparing the tax return

A volunteer will be remotely working in preparing your tax return. Volunteers are provided with computer equipment that is solely configured for tax preparation and meets IRS standards for tax preparation. The tax return will be prepared using IRS provided tax preparation software that is password secured

7. Performing the quality review

A second volunteer always reviews the work of another volunteer to ensure quality standards are met. Volutneer Reviewers will be working remotely with computer equipment that is solely configured for tax preparation and meets IRS standards for tax preparation. The tax return will be prepared using IRS provided tax preparation software that is password secured

8. Sharing the completed return

The Quality Reviewer will call the taxpayer and overview the reviewed return. This is done to ensure accuracy and to ensure the taxpayer understands the results from the tax return.

9. Signing the return

There will be two options for signing the tax return.

- 1. The preferred method is via E Signature sent to email. This will ensure the taxpayers do not need to return to the physical site.
- 2. If E signature is not possible the quality reviewer will set up an appointment for the taxpayer to return to the site to sign.

10. E-filing the tax return

Upon receiving the signature either electronically or by paper volunteers will E file the return within 24 hours.

Page three of this form will be maintained at the site with all other required documents.							
Part III: Taxpay	er Consents:						
Request to Revie	ew your Tax Return for Accuracy:						
select free tax pre personal informati accurately prepard services provided	Fo ensure you are receiving quality services and an accurately prepared tax return at the volunteer site, IRS employees randomly select free tax preparation sites for review. If errors are identified, the site will make the necessary corrections. IRS does not keep any personal information from your reviewed tax return and this allows them to rate our VITA/TCE return preparation programs for accurately prepared tax returns. If you do not wish to have your return included as part of the review process, it will not affect the services provided to you at this site. If the site preparing this return is selected, do you consent to having your return reviewed for accuracy, by an IRS employee?						
Virtual Consent l	Disclosure:						
is required on this return for you. (If the weak may not be able your consent agree information, Fede hacked or breach amount of time the signature. If you be your permission,	document. Signing this document means that you his is a Married Filing Joint return both spouses alle to prepare your tax return using this process. Seeing to this process. If you consent to use these ral law may not protect your tax return informationed without our knowledge. If you agree to the dispart you specify. If you do not specify the duration of	this document.) If you chose not to sign this form, ring your tax return virtually, we have to secure stems to disclose or use your tax return or distribution in the event these systems are return information, your consent is valid for the ur consent is valid for one year from the date of perly in a manner unauthorized by law or without ion (TIGTA) by telephone at 1-800-366-4484, or ersight requirements to Volunteer Income Tax e operated by IRS sponsored partners who					
Printed name		Printed name (spouse if married filing joint)					
Date of birth	Last four digits Social Security/ITIN number	Date of birth	Last four digits Social Security/ITIN number				
Date	Telephone number	Date	Telephone number				
Email address		Email address					
Signature (electror		Signature (electronic)					
Signature (type/pri	OR	OR Signature (type/print)					
Cigilatal (type/pil	'''	Oignature (type/pint)					

Special Oregon Medical Subtraction (SOMS) and Self Employment Health Insurance Calculator

Medical Expenses Table								
The data in the green cells are the values to be entered into TSO Federal Schedule A Medical Expenses Screen. Data in the orange cells are the SOMS amounts to be entered into TSO. Data in the red cell should match Schedule A Line 1.								
Taxpayer's Name								
*Tax Year	Tax Year 2017 2018 2019 2020 Calculate Self-Employment Insurance Yes No							
Only enter Schedule A expenses not entered elsewhere on the return e.g. do not enter self employed insurance premiums from Schedule C.								
Use TSO Column to enter Federal Schedule A Medical Expenses into TaxSlayer. (Row sequence is the same as TSO. Doctor and Dentist Expenses are added together in the Doctor Row.)								
Medical Expenses Taxpayer Spouse If filing John Dependents Subtotals Medical Expenses Jointly								
Medicare								
Other Medical Insurance								
Doctor Copays								
Prescription Drugs								
X-rays, Labs and Tests, etc								
Nursing Help								
Hospital								
Medical Aids (Glasses, Hearing Aids, etc.)								
Dentist								
Medical Miles								
Other								
Long Term Care (Enter \$ up to the limit)					Separately Enter Each Individual in TSO			
Total Medical Expenses								
Grand Total < Verify equal to Schedule A line 1								

Cash Charitable Contributions

Non Cash Charitable Contributions