

## York AARP Tax-Aide 2021 Tax Season

**Call the Dover Library at 717-292-6814 if you need to reschedule or cancel your appointment.**

The 2021 tax season will be different from how we operated in the past. In order to provide a safe, COVID-free environment for our volunteers and taxpayers, and to ensure we prepare an accurate return for you the taxpayer, we need your help to minimize the time you will spend in-person with our volunteers. All our volunteers are fully vaccinated; we encourage all our taxpayers to be fully vaccinated.

### **Your tax preparation will require only one visit to your assigned site.**

1. When you schedule your appointment we will give you a location, date, and time.
2. Prior to your scheduled appointment you need to pick up the Intake/Interview booklet and
  - a. Complete the first 4 pages
  - b. read the last three consent forms and sign if you consent
3. Plan to arrive at your appointment time – if you are early we may not be able to let you in due to room capacity constraints
4. Have all forms completed to the best of your ability.
5. We have an Itemized Deduction Worksheet if you are planning to itemize deductions instead of using the standard deduction
6. If you are considered Self-employed we have a Self-employed worksheet you need to complete
7. Review the back of your AARP Foundation tax envelope (your 2020 tax return envelope) which includes a section “Your Responsibilities” and a section “Information to Bring Next Year” and bring all documents you feel we may need to prepare your return.

### **What to bring to the appointment:**

1. A government issued Photo ID for each taxpayer and Social Security cards or the Social Security Statements for every individual on your return.
2. Your completed Intake/Interview & Quality Review booklet
3. If you are claiming itemized deductions, the completed “Itemized Deduction Worksheet”.
4. If you have self-employed income, the completed Self-employed worksheet.
5. Bring only the tax documents, please take them out of their envelopes before you arrive
6. If you want a direct deposit of any refund, or a direct debit for any amount owed, bring a blank check with your routing and account numbers.
7. Your 2020 tax return, or 2019 return if you did not file in 2020
8. The amount of economic stimulus received beginning in March 2021 (**\$1,400 for most taxpayers and their dependents**)

### **How we will interact with you during your appointment:**

1. Your mask must be appropriately worn at all times.
2. You will be interviewed by a certified counselor to review your information and tax documents, including your 2020 return, to make sure you give and tell us everything we need in order to prepare your return
3. You will go to a separate area while a certified counselor prepares your return (they may need to contact you if they have any questions concerning your return)
4. Your return will be reviewed by a second certified counselor to insure accuracy (they may need to contact you if they have any questions concerning your return)
5. We will print your return and a certified counselor will review your return with you
6. You (and your spouse, if filing jointly) will sign a form to authorize us to electronically file your return and acknowledge your responsibility for it.
7. You will receive a copy of your 2021 tax return and get back all of your tax documents.
8. We will provide you with any documents you need to mail and instructions for mailing.