

TCE Intake Form



Date _____

Taxpayer name _____

Spouse name _____

Address _____

Phone _____

Email _____ (*Email will only be used for non-sensitive information or to let you know we are trying to reach you for information*)

If you have not already done so, call 607-279-6617 and make an appointment to bring in your tax documents. You must wear a mask covering nose and mouth, answer COVID screening questions, have your temperature taken before entering the building. Hand sanitizer will be provided. Please also bring a working pen to sign forms at the appointment. We regret that we cannot allow any additional persons to accompany you unless needed for mobility or communication assistance.

Because of the pandemic, taxpayers will not meet directly with preparers. Instead, you will complete information forms and bring them and your tax documents to a brief intake appointment. Preparers will contact you if additional information is needed. You will be contacted when your return is complete and an appointment made to sign and file your return.

Please read the *What to Bring to Your Intake Appointment* sheet; it will help you collect all your needed documents.

Besides your tax documents, complete the following forms and also bring them with you:

- Intake/Interview & Quality Review Sheet (Form 13614-C, 4 pages)
- NY Income Tax Worksheet (TP-301) (Ask for a military version if you or your spouse was on active duty in 2020)
- Virtual VITA/TCE Taxpayer Consent (Form 14446) *Note that this form describes the process that will be used to safely and securely prepare your return this year.*

Since we cannot meet with you face-to-face this year, we must be able to reach you if we have questions or need additional information. At what phone number can you be reached on Wednesdays 12:30-3:30, Thursdays 9-4, and Fridays 9-Noon? _____ Preparers may be using their personal cell phones with Caller ID blocked, so please answer your phone during those times.

Pick a password or phrase to be used so we can make sure we're talking to you: _____
At your intake appointment, you will be provided the phrase a Lifelong volunteer will use so you can feel secure about sharing your information.

If you do have any concerns about reading, writing, or communicating with us or completing your forms, please let us know so we can do what is needed to help you successfully complete this year's process and to make sure you understand your tax return.