

LETTER OF INSTRUCTION FOR DROP-OFF

United Way SELA is offering tax preparation services through its Volunteer Income Tax Assistance (VITA) program to the community and surrounding metro area beginning Tuesday, January 19, 2021 through Tuesday May 18, 2021.

Due to the **COVID 19 Pandemic** we will not be able to provide on-site tax preparation as we have in the past. This tax season we will still assist our customers in preparing their tax returns electronically but will be using a Virtual Drop-off process instead of face-to-face contact. IRS certified volunteers still provide free basic income tax preparation with electronic filing and direct deposit of refunds to qualified individuals.

Customers that want to have their taxes prepared will need to drop off all tax return information at the United Way of SELA office, 2515 Canal Street, New Orleans, LA 70119. They will have a **designated locked drop box** in the front of the building near the entrance door, available 24/7 for this purpose. The Office will be open on Tuesdays and Thursdays from 9:30 am to 2:00 pm. It is imperative that you include copies of your photo IDs and Social Security cards for you and all other dependents claimed on your tax return.

How the Tax Preparation Process Works

This package includes

1. Important tax records envelope (place all tax documents inside this envelope)
Please send copies of all documents:
 - Photo IDs and Social Security cards for everyone listed on the return
 - W-2s, 1099Rs, 1099-G, 1099-MISCs, W2-G for gaming winning, etc.
 - 1099DIV or 1099INT Dividend and Interest documents
 - Any other related documentation you have received (1099, 1098-T, etc.)
 - Total paid for daycare expense, provider's Name, Tax ID#, Address, and Phone number.
 - Health Insurance Form 1095A from the Marketplace.
 - Voided check or bank account info for direct deposit.
 - IPIN letter from IRS (if Identity Theft)
2. Intake/Interview & Quality Review Sheet (Complete this yellow form, sign the last page and place in the envelope)
3. Form 14446 sign the last page of this form and place in the envelope.
4. Place all documents and forms inside the **Important Tax Records Envelope**, seal it and place in the drop box.
5. Prepare for Virtual Session
 - The preparer will contact you via telephone number or email. Please be sure you provided a valid phone and email address on the Intake/Interview Sheet.
 - The tax preparer will go over the information you provided and the result of the return
 - Corrections will be made at this time, if any.
6. Taxpayer will come back to the office as soon as possible to sign and pick-up their return.

If you have any questions, you may call 504-408-4429.