



JANUARY 30 - APRIL 18, 2023

Taxpayers can make an appointment to get their taxes prepared by calling 513-569-1840 or drop-off copies of tax forms Monday through Friday, 8am - 5pm at Community Action Agency (2nd-floor lobby).

PLEASE PROVIDE COPIES OF THE FOLLOWING TAX DOCUMENTS:
(The documents you provide will NOT be returned to you.)



Photo ID

for primary taxpayer and spouse, if applicable, Spouse must be present.



Social Security Card

or ITIN (Individual Taxpayer Identification Number) notices or cardsbank/financial statements for everyone listed on tax return.



Income Statements

All W-2's, 1099's, 1098, All bank/financial statements.



Other Documents

Proof of expenses such as: home, medical, charitable, etc.



Healthcare Statements

Healthcare Statement Forms: 1095-A



Account Information

Account and routing numbers for direct deposit.

*Income below 400% of Federal Poverty Guidelines.
(See U.S. Poverty Guidelines for 2022).



Earned Income Tax Center (EITC)

Q&A's - 2023

1. What are the operating dates for this tax season at CAA? 1/30/2023 - 4/15/2023

We will have three "Super" Saturdays from 9am - 1pm: 2/4, 2/11, 2/18. Volunteers will be leaving by 2pm.

2. Will we have face to face tax preparation?

Yes - modified. Taxpayers will obtain appointments by calling 513-569-1840, option 4. Tax returns will be prepared onsite, while clients wait in the Lobby. Any tax questions, preparers/reviewers will ask in person or via cell phone to taxpayers.

3. Prior year return process will be handled by the drop-off process only.

4. Volunteers and taxpayers are required to wear masks.

5. What is pre-screening?

Pre-screening is a review of the taxpayers tax intake documents by a tax volunteer - for those who want to drop off tax documents. It helps to ensure the taxpayer has the Intake Packet properly completed and that obvious documents are not missing. This should speed up tax processing for those who are pre-screened. **Pre-screening for drop-offs is optional, but strongly recommended.**

Pre-screening is available at CAA in the GLR room on 2/1/2023 - 4/14/2023, on Mondays & Wednesdays, from 9:30am - 4pm.

Pre-Screening process - The Taxpayer:

Obtains a number and checks in at the Reception Desk.

- Obtains an Intake packet and tax envelope from the Resource Table in the CAA 2nd Floor Lobby
- Completes the intake packet and places **COPIES** of the completed intake and tax documents in the tax envelope.
- On Mondays & Wednesdays, taxpayers can wait in the CAA Lobby for in person screening, which is optional. A tax preparer will come out and get their tax packet, for review.
- Otherwise, complete and drop-off the tax envelope in the black box on the wall in the Lobby.
- **Volunteers and taxpayers are required to wear masks.**
- On Mondays & Wednesdays, the tax packets will be reviewed. The taxpayer will be texted/called/questioned in person regarding the status of their tax packet. Do not leave without knowing the status of your packet.
- Incomplete packets are returned to the taxpayer with a list of items they must obtain before the processing their return can begin.

6. Are there other methods of drop-off:

- The taxpayer can pick-up an Intake Packet on the table in the CAA Lobby, follow the instructions to complete the packet, and drop the packet off in the drop box in CAA's Lobby or the drop box in the parking lot.
- OR the taxpayer can obtain an Intake Packet at cincy-caa.org/eitc and follow the instructions.

7. How long should the drop-off process take?

We estimate the entire process should take two weeks. Having missing forms or information makes the process significantly longer.

8. Where will Tax Intake Packets and tax envelopes be located?

Blank tax packets and envelopes will be placed on the resource table in the CAA Lobby.

9. What happens after the tax season is over and I have a question about my taxes?

The taxpayer can call 211, the United Way's resource line, to obtain assistance.