TAXES

CAA Intake Instructions
Tax Year 2024

1/27/2025 – 4/15/2025

1. Please complete all the pages included in this packet.
2. **WE NEED COPIES OF ID's, TAX DOCUMENTS, AND THE FULLY COMPLETED TAX INTAKE FORMS.**
3. **We cannot process your tax return, if the intake forms are not complete** or if there are **missing COPIES** of IDs or tax documents.
4. To **make** tax prep **appointments: call 513-569-1840, option 2**. Appointment availability is based on the number of tax volunteers. OR see **App.CAPAppointments.Com** for online scheduling.
5. **For drop-offs: Place completed INTAKE** and **COPIES** of tax documents and IDs in the **tax envelope**. Bring the envelop to the pre-screening and give it to the Screener.

Pre-Screening of drop-offs – Required

Hours: Mondays & Fridays - 9:00 am to 3:30 pm – First come, first served

Pre-screening by a volunteer helps to ensure that you have the necessary tax documents.

1. Take a number, pick-up a TAX packet and tax envelope from the Resource table in the CAA 2nd Floor Lobby and complete the packet.
2. Place in the envelope your tax packet and **COPIES** of your tax documents and ID.
3. Wait in the Lobby for the Screener to call you. If you have waited over 10 minutes, please go into the Receptionist Desk for assistance.
4. Your packet will be reviewed. If forms are missing, you will be given a list of what is needed. If your packet is complete, the Tax Center will keep it. Do not leave without knowing the status of your packet.

GET COPIES OF TAX DOCUMENTS FREE

Cincinnati Library Branches will let you make black and white copies of your documents & ID. The first 33 pages are **FREE**, after that, there is a $0.15 per page charge.

You need to get COPIES of:

- **Photo ID –** has your picture and name
- **Social security cards or ITIN's for everyone on your tax return OR SSA-1099's OR letter or document from Social Security with your name and last four digits of your social security number**
- **Tax Documents –** W2's, 1099's, income statements, bank statements, charitable giving, gambling winnings, etc.
- **Bank Account Info for direct deposit –** bank name, routing number & account # & type of account (checking or savings)

For prior tax years, 2020 or 2021, you will additionally need:

- **Letter 6419 from the IRS, if you received Advanced Child Tax Credits**
  (The IRS started sending this out in December, 2021.)
- **Letter 6475 from the IRS, if you received the third round of Economic Impact payments.**
  (The IRS sent this out in late January, 2022.)
- **Your 2019 tax return**, if you earned more money in 2019 than in 2020 or 2021. If your 2019 tax return was prepared at CAA, you do not need to include it.

Updated: 1/22/2025