



JANUARY 30 - APRIL 18, 2023

Taxpayers can make an appointment to get their taxes prepared by calling 513-569-1850 or drop-off copies of tax forms Monday-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 SS Income Notice or ITIN Card (Individual Taxpayer Identification #) for everyone listed on tax return.



Income Statements

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



Other Documents

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



Healthcare Statements

Healthcare Statement Forms: 1095-A, if applicable.



Account Information

Bank name, account and routing numbers for direct deposit.

*Income eligibility to receive tax preparation assistance is \$85,000 a year or less.



Free Income Tax Preparation Center – Questions and Answers

1. What are the operating dates for this tax season at CAA? 1/30/2023 – 4/18/2023

Appointments are available Tuesdays, Thursdays, and Fridays. Also available are three walk-in Saturdays, from 9am– 1pm: 2/4, 2/11, 2/18, first come, first served.

2. How to make appointments for tax preparation?

Call 513-569-1850 to obtain an appointment. You may leave a message with your name and phone number.

3. Will we have face to face tax preparation?

Yes, by appointment only.

4. What is optional drop-off pre-screening?

Drop-off pre-screening is a review of the taxpayer's completed intake and tax documents by a tax screener. This screening process ensures the taxpayer's Intake Packet is complete with no obviously missing tax documents. As a result, tax processing for pre-screened returns is faster. Pre-screening for drop-offs is strongly recommended.

When is optional drop-off pre-screening available?

Mondays and Wednesdays, from 9:00 am – 3:30 pm, January 30, 2023 - April 12, 2023

Pre-Screening process - The taxpayer:

- Obtains a number and checks in at the reception desk on the 2nd Floor Lobby. (The receptionist adds the person's name to IVR, letting the Tax Center know that a taxpayer is in the Lobby.)
- Completes an intake packet and tax envelope from the resource table in the CAA 2nd Floor Lobby. Then copies of the completed intake and tax documents are placed in the tax envelope and dropped in the drop box.
- Gives completed tax intake packets to the tax volunteer for review. Successfully reviewed packets are kept by the Tax Center.
- Incomplete packets are returned to the taxpayer with a list of items needed before return processing can begin.

5. Can you drop-off your intake and tax documents without pre-screening?

Yes.

- The taxpayer can pick-up an Intake Packet on the resource table in the CAA lobby, follow the instructions to complete the packet. Place the envelope 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 www.cincy-caa.org/eitc and follow the instructions in the packet.

6. How long will tax processing via drop-off take?

We estimate the entire process should take up to ten (10) business days, depending upon the number of tax volunteers available.

7. Where will Tax Intake packets and tax envelopes be located?

Blank tax packets and envelopes will be placed on the resource table on the CAA 2nd Floor Lobby.

8. Do you process prior year returns?

Yes, prior years 2019, 2020, 2021. 2019 tax returns must be mailed to the IRS or state. 2020-2022 tax returns can be e-filed or mailed. 2022 is the current tax year.

9. What happens after the tax season is over and I have questions about my tax return?

The taxpayer can call 211, the United Way's resource line, to obtain assistance, e.g. get a copy of the return, etc.