

Procedures for Leeward Tax Volunteers

(printed copies of this list will be available at our volunteer site)

ASK FOR HELP WHEN NEEDED

Setting Up and Starting Procedures

1. Come early so you can help set up the rooms.
2. Initial by your name and date on the volunteer list. The list and other materials for volunteers will be in room BE-228.
3. Spread out as much as possible (use every other row and every other computer) to avoid other taxpayers from seeing and overhearing your client's information. We can use three classrooms if needed (BE-229, 228, and 226).
4. Double-up with another volunteer when possible so you can double check each other's work. If possible arrange your seating so the client can see what is on your computer screen.
5. The computers should already be set up. If not, use only Microsoft Internet Explorer. Go to <https://twonline.taxwise.com>
 - Client ID: 350819
 - See Roy if you need a User Name and Password (do not share with unauthorized individuals); see Roy if you cannot reset your password.
 - You should see a **BLUE** border in the real TaxWise Online program, **GREEN** is the training mode.
6. Work on your own tax returns only if no taxpayer is waiting.
7. In room BE-229 taxpayers will sign-in and take forms they need to complete. When you are ready call the next taxpayer on the sign-in list. Cross off the name from the list so we know who is next.
8. Greet the taxpayer and lead him or her to your computer.
9. Go over with the taxpayers or help them complete the following forms:
 - a. Form 136514-C – Intake/Interview & Quality Review Sheet (beige)
 - b. Supplemental Intake Form (yellow) – not used to prepare the return but will be given to our supporting non-profit agency.

Work on the return

- Use your reference materials.
- Ask for help when needed.

After completing the federal and Hawaii returns...

1. Make sure you complete Section B of the beige-colored **Form 13614-C** is complete.
2. Double check spelling of all names and Social Security numbers. If they do not match with what is on the records of the Social Security Administration, the return will be rejected.
3. Double check that dependents are not claiming their own personal exemptions. There is a checkbox on the Main Information screen to say the taxpayer is claimed on another return. If you know another volunteer is working on the return of the parent or child of your taxpayer, double-check with the other volunteer that the taxpayers are not being claimed on more than one return. If a person's exemption is already claimed on a filed return, any subsequently filed return with the same taxpayer exemption will be rejected.
4. Click the **Run Diagnostic** button. Diagnostic info appears on top half of screen.
5. Fix any **Errors** and Run Diagnostic again. You need to see "None" message for Errors.
6. If no errors and everything appears okay, scroll to bottom of Diagnostic window and click **Create e-files.**
7. Have Section C of Form 13614-C completed by someone who has passed the Intermediate certification, including yourself if you have passed the Intermediate level.

8. If you make any subsequent changes to the return, redo the above steps 4-8.

Printing Return

1. Click the **Print Return** button and wait.
2. Click the **Open in a new window** link.
3. Review the return on the screen with the taxpayer.
4. Print one copy of the whole return for e-filed returns. Print extra copies of voucher forms if the taxpayer is mailing in payments for e-filed returns. Print an extra copy of the whole return if the taxpayer is filing a paper return.
5. Since we share one printer in each classroom make sure to pick up your printout right away. There should be no unattended printouts at the printer. Mark up or tear papers to be shredded and place them in the shred folder in room BE-228.
6. Compile the printouts including the penciled-in Form 13614-C and the information the taxpayers brought with them to give back to the taxpayer.

Finishing

1. **Review the paper copy of the return with the taxpayer.** Taxpayers with e-filed returns and direct deposits can expect refunds in 10 to 14 days. E-filed returns with mailed refunds can receive checks in 3 to 4 weeks. Mailed returns with mailed refunds can take 6 to 8 weeks.
2. Have the taxpayers **sign the extra Form 8879** for e-filed returns and attach the federal set of W-2 forms (copy B) and any other forms showing **income tax withholdings**. Let Roy or Shelley know if you need to make photocopies. **Turn in these items for our records. Even though an e-file was created the return will be electronically submitted only if we have the signed Form 8879.** Also, turn in the yellow **Supplemental Intake Form** for our records. Place these forms in the appropriate folders in room BE-228. Anything that needs to be shredded, mark the top page with "SHRED" and place in the shred folder in room BE-228.
3. Give the taxpayers their copy of the return in the black and white envelope. Also, give back the information they brought with them. The envelope has a phone number and web address for taxpayers to check the status of their federal refund. Hawaii refund information can be found at: www.hawaii.gov/tax or 808-587-4242. Provide the taxpayer with mailing addresses (pink sheet) if the returns are being paper filed and not e-filed, or if vouchers are to be mailed in with payments.
4. Make sure all papers have been accounted for and nothing is left on your desk from the tax return you have just completed.
5. Thank the taxpayers for using our services. Ask them to bring back the 2010 return next year to help us prepare their 2011 return. Make sure they do not leave any of their belongings.
6. Take a deep breath, smile, and call the next taxpayer on the sign-in sheet.