University of Pennsylvania Health Systems Virtual VITA for Employees



Intake

University of Pennsylvania Health System

1

Employee picks up Consent Form & Intake Sheet (13614C) thru e-mail or at the intake site.

2

Employee calls intake site to make an appointment w/ a certified volunteer*.

3

Employee goes to the intake site at appointment time & provides Consent Form & all other necessary documents to a certified volunteer.

4

A certified volunteer ensures all forms are completed, makes copies of all of the documents & answers any questions.

5

Employee's name, date & time of dropoff is marked on top of envelope (Pub 730). The envelope is then stored in a secure location in a locked file cabinet. 6

The forms/docs are scanned & shared via File-Works w/ return prep site.

*Certified volunteer screens employee to ensure:

- They qualify for basic return prep
- They have all necessary documents
- Appointment verification

Preparation

LIFT- Philadelphia Fox School of Business Zlotnick, Lehigh

Preparation

LIFT- Philadelphia Fox School of Business Zlotnick, Lehigh

1

Certified volunteer preparer pulls up scanned files from File-Works & inspects all forms/docs & notes any incomplete items on 13614C*. 2

Preparer inputs return data from all forms/docs into 'TaxWise Online'.

3

Preparer calls employee to conduct interview & address any questions or incomplete items from necessary forms.

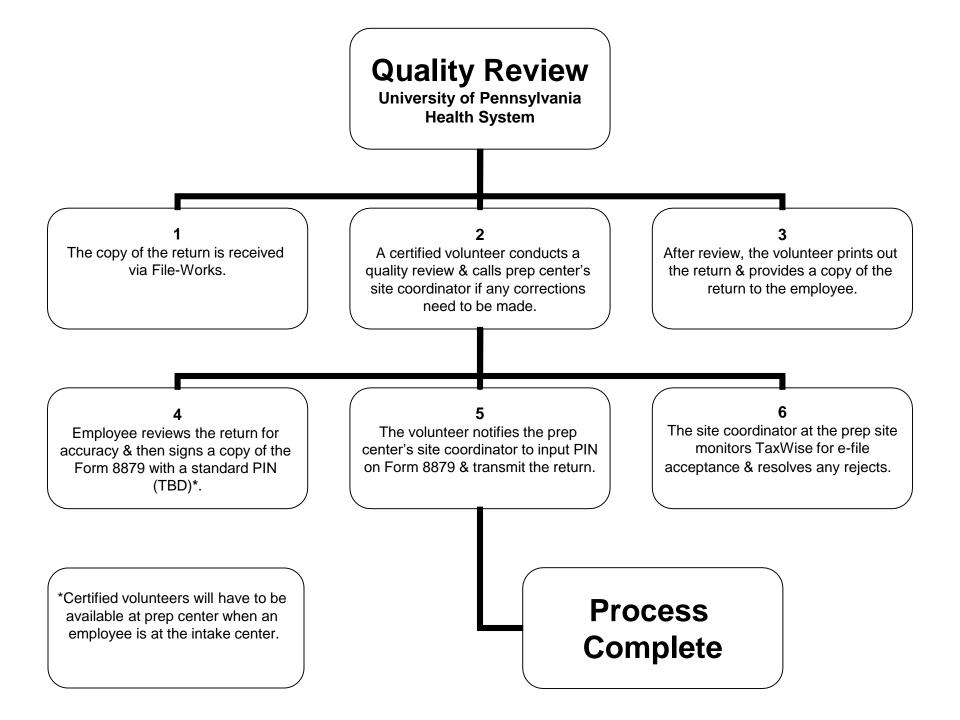
4

Preparer sends a copy of the completed return to the intake site via File-Works.

*If incomplete, return should not be started. Call employee to complete, & follow-up with intake center volunteer.

Quality Review

University of Pennsylvania Health System



Intake / Quality Review

- University of Pennsylvania Health Systems
 - 3001 Market St., Philadelphia, PA 19104
 - Open Wednesdays: 8am-12pm / 1pm-4pm
 - 2-3 volunteers / shift

Preparation

- LIFT- Philadelphia
 - 5548 Chestnut St., 1st Floor, Philadelphia, PA 19139

- Temple Ambler, Fox School of Business
 - 580 Meetinghouse Rd., Ambler, PA 19002
- Susan Zlotnick Enterprises
 - Address?