

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 drop-off 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

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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

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Quality Review

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1

The copy of the return is received via File-Works.

2

A certified volunteer conducts a quality review & calls prep center's site coordinator if any corrections need to be made.

3

After review, the volunteer prints out the return & provides a copy of the return to the employee.

4

Employee reviews the return for accuracy & then signs a copy of the Form 8879 with a standard PIN (TBD)*.

5

The volunteer notifies the prep center's site coordinator to input PIN on Form 8879 & transmit the return.

6

The site coordinator at the prep site monitors TaxWise for e-file acceptance & resolves any rejects.

*Certified volunteers will have to be available at prep center when an employee is at the intake center.

**Process
Complete**

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?