

# Frequently Asked Questions about United Way and the AARP Foundation's Free Tax Preparation Programs

## Services & eligibility

### Can I file my taxes with you? Are there types of taxes that you don't do?

**Tax-Aide:** File in person at a tax site with an IRS-certified tax professional.

- Federal returns
- Minnesota returns only--no out of state returns
- Property tax returns
- 2017 returns and up to 3 prior years (2014-2016)
- No inventory, depreciation, employees, or bankruptcy
- Ideal for low- and moderate-income taxpayers
- Appointments available with interpreters
- Appointment only

**Myfreetaxes.com:** File on your own online with phone or in-person support

- Federal returns
- Returns for up to 3 states
- Property tax returns
- 2017 taxes only
- No foreign income
- Comfortable using a computer on your own
- Free for households earning up to \$66,000
- Schedule an appointment, walk in, or file on your own from home

### Where are appointments held? Which dates and times are appointments available?

Appointments begin February 1; the last income tax appointment will be on April 17. A limited number of property tax appointments will be available at most sites during June, July, and the first half of August.

Appointments are available at the following locations. Each location offers appointments at different days and times. Call 507-287-1958 for availability and to schedule an appointment beginning January 15. Tax assistance is available by appointment only (except MyFreeTaxes.com), and appointments can only be scheduled by calling the United Way of Olmsted County/AARP Foundation tax assistance line at 507-297-1958.

**The Salvation Army Service Center**

120 First Street NE

Parking: Limited metered parking during day, free parking after 5 pm

**125Live (formerly Rochester Senior Center)**

125 Elton Hills Drive NW

Parking: Free parking in on-site lot

**Hawthorne Education Center**

700 4th Ave SE

Parking: Free lot and street parking

**MyFreeTaxes.com Clinic at Rochester Public Library**

By appointment or walk in: Wednesdays 5-8 pm February 1-April 17

101 2nd St SE

Parking: Ramp is free after 4 pm

**Stewartville Civic Center**

105 1st St E, Stewartville

Parking: Free public parking lot

**Dodge Center Library**

13 1st Ave NW, Dodge Center

Parking: Free parking

**Mantorville Senior Center**

601 Clay St, Mantorville

Parking: Free parking

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**I'm not familiar with MyFreeTaxes.com. What is it? How is it different than AARP's Tax-Aide?**

Myfreetaxes.com is a facilitated self-assistance product available to eligible filers in all 50 states. Taxpayers can file federal returns and up to three state returns. There is a toll-free helpline (1-855-698-9435) staffed by IRS-certified operators who can help filers with technical and filing questions. Myfreetaxes.com is free for households that earned less than \$66,000 in 2017.

In-person filing assistance for Myfreetaxes.com is available every Wednesday 5-8pm from February 7 – April 11, 2018, at the Rochester Public Library from 5-8 p.m. You must be comfortable using a computer and Internet on your own. Both scheduled appointments and walk-in assistance are available. You can also file on your own from your home computer.

**Is there an income limit for receiving free tax assistance?**

There is no income limit for receiving tax filing assistance through AARP Foundation's Tax-Aide; however, the service is intended to support low- and moderate-income taxpayers.

MyFreeTaxes.com/ Rochester Public Library clinic is free for households that earned up to \$66,000 in 2017 (annual gross income for individuals or couples filing jointly).

**I don't need to file income taxes—only property taxes. When is the earliest appointment available?**

If you only need to file property taxes, please wait until March to call for an appointment. This is a change from our policy in prior years. The filing deadline for property tax refunds is August 15th, and we would like to keep earlier appointments open for income tax filers who can receive needed refunds earlier in the year.

# What to bring

## What should I bring to an appointment?

Follow the links below for a list of documentation to bring with you to your tax appointment (coming soon!)

Taxpayers with an AARP Foundation's Tax-Aide appointment may also download, print, and complete the Federal Intake Form. If you are not able to complete the Federal Intake Form ahead of time, plan to arrive 15 minutes prior to the start of your scheduled Tax-Aide appointment. The Federal Intake Form is not required for MyFreeTaxes.com appointments.

## Who needs to bring a photo ID? Can I make an appointment without one?

All taxpayers must present a photo ID when they check in for an appointment at a Tax-Aide site. You may not schedule an appointment at a Tax-Aide site if you do not have a photo ID.

Taxpayers from households that earned less than \$66,000 can make a MyFreeTaxes.com tax clinic appointment without a photo ID.

## What types of photo ID are acceptable?

A driver's license from any US state or territory, a State ID card, military ID, or passport.

## Where can I go to get a photo ID if I don't have one?

Minnesota Driver and Vehicle Services provides drivers license and state ID cards. Their website is [www.dps.mn.gov](http://www.dps.mn.gov).

## My public benefits aren't taxable income. Are you sure I have to bring documentation?

Yes. You will need documentation of all benefits to file for renter's or homeowner's property refund in Minnesota, which requires proof of all household income.

## I don't have a copy of my return from last year. Can I make an appointment without one?

Yes, but if there are any loss carry-over amounts, last year's return is necessary. In this case, if you filed your 2016 taxes with us last year, we will be able to access a copy of your return. We are not able to access returns filed with Tax-Aide prior to 2016. If you did not file with us last year, you will need to bring a copy of the return to your appointment.

If you do not have a copy of the prior year's return, you will need to request a transcript from the IRS. You can order by phone at 1-800-908-9946 or go online to request a transcript by mail. The website is <http://www.irs.gov/individuals/get-transcript>.

Filers who used MyFreeTaxes.com last year will be able to access last year's return as long as you still know your login information. New MyFreeTaxes.com filers will need to have the AGI (annual gross income) from your 2016 tax return in order to file.

### **I heard I should fill out the intake form ahead of time. Is that true? Where can I get one?**

Taxpayers with a Tax-Aide appointment can complete the federal intake form when you arrive at your appointment; you should arrive 15 minutes ahead of time to allow time to complete the form.

Taxpayers with a Tax-Aide appointment can choose to complete the federal intake form ahead of time and bring the completed form to the appointment. Forms can be obtained at:

- The Salvation Army Service Center—use the main entrance on 1st Ave
- 125Live—use the main entrance
- Hawthorne Education Center—main office
- Stewartville Civic Center—reception desk
- United Way of Olmsted County—reception desk
- Rochester Public Library—main desk
- Online from United Way’s website-- click here

MyFreeTaxes.com filers do not need to complete an intake form.

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## **Unique Circumstances**

### **Do you offer filing assistance to undocumented non-US citizens?**

Yes. Taxpayers who are not eligible to receive a social security number need to apply for an Individual Tax Identification Number (ITIN). Taxpayers who need ITIN assistance can call the IRS at 1-800-829-1040 or learn more on line at <https://www.irs.gov/individuals/international-taxpayers/general-itin-information>.

### **Do you offer filing assistance to homebound taxpayers?**

No. We are no longer able to offer filing assistance to taxpayers in their homes. If the taxpayer has given Power of Attorney for finances to another person, that person is allowed to make an appointment. If a taxpayer is unable to come to a Tax-Aide location, they may be eligible to file using [Myfreetaxes.com](https://www.myfreetaxes.com).

### **Can I make an appointment to complete a tax return for my family member?**

No. There is no way to verify identity of the taxpayer unless they come to their appointment with photo ID and social security or ITIN card. Note that in the case of a married couple filing a joint return, one spouse may bring all the required documentation and ids, but both spouses are required to sign the return.

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## **Language Services**

### **Are interpreters available?**

Yes. A limited number of appointments with language services will be offered through Intercultural Mutual Assistance Association (IMAA). Language service appointments will be handled by IMAA. If you require language services, call (507) 289-5960 ext. 107 beginning January 16.

Another option for taxpayers who require interpretation assistance is to bring a trusted family member or friend with English-language fluency to their appointment.

## Other tax inquiries

### **I filed my return with you earlier this year, but I think there was an error.**

If you need to follow up on a complete tax return, please call us at 507-287-1958. Leave a message with your first and last name, your phone number, the location of your appointment, the date of your appointment, and a brief explanation of why you are calling. We will follow up with the preparer who completed your return as needed and return your call as soon as possible.

### **I am filing my taxes myself, and I have a question about something on this form. Can you answer it?**

No. Our tax appointment line is staffed by volunteers, and IRS-certified tax preparers are not available on site to speak with callers.

### **I am not able to use your services because my return is out of scope or an appointment is not available.**

#### **Where else can I go to get my taxes done?**

If you need to file a return that is out of scope for a Tax-Aide appointment, or if appointments are not available, check to see whether MyFreeTaxes.com is an appropriate alternative for you.

IRS regulations prohibit us from making recommendations to paid preparers. If you would like to find for-profit tax preparation services, you will need to use Google or the phone book.

### **I filed my return, but my refund hasn't arrived. Where is it?**

We are unable to check on the status of your refund. To do so, you will need to use the IRS Where's My Refund? service. You will need your SSN/ITIN, your filing status, and the exact amount of your expected refund from your return. This can only be done online at <http://www.irs.gov/refunds>. At this time, there is no Where's My Refund? service available by phone.

## Questions?

Learn more about how United Way's free tax preparation programs can benefit you or someone you know at [www.uwolmsted.org/taxhelp](http://www.uwolmsted.org/taxhelp).

*Call Emily Johnston, Outreach Program Manager, United Way of Olmsted County at 507-287-2002.  
To schedule an appointment, please call 507-287-1958.*

