

# VITA Loveland Mobile Tax Preparation App

PLEASE READ this entire document CAREFULLY

To provide tax preparation service with no physical contact, VITA Loveland has activated an application within our TaxWise software that allows secure end-to-end **mobile** tax preparation. Using TaxWise Mobile, clients can securely enter information and upload documents from their smartphone, tablet, or computer. Our IRS-certified volunteers will prepare and review your tax return, then securely send it to you to review prior to consenting to electronic filing.

To complete a return using TaxWise Mobile, you must be comfortable using the technology required to scan or digitally photograph your tax documents, upload those documents, and print the documents that will be sent to you. This [video](#) demonstrates how to use TaxWise Mobile.

We may screen by prior client status and Northern Colorado zip codes as we only have limited capacity.

Upon request to [contact@vitaloveland.org](mailto:contact@vitaloveland.org), you will receive an email invitation with a website link to establish a client account with VITA Loveland Inc. Two fillable consent forms will be attached to the email and must be printed and physically signed. The **signed** documents must be scanned or imaged for subsequent uploading. A fillable IRS Intake & Interview Form 13614 will also be attached to be completed and saved as PDF for upload. Your account sign-in requires an e-mail address and a password which are chosen by you when establishing your account.

After your client account is established, follow the web-based interview process to enter your personal information and upload tax information. Once your consent forms, photo ID, and tax information are submitted, we will have a brief internet Zoom video conference to verify identity based on your uploaded photo ID (usually your driver's license).

We will then assign your return to our IRS certified volunteers and quality reviewers. You must be available by email or phone in case we need additional information to perform a complete and accurate tax return. You can sign into your account again to upload any missing information or to track the status of your tax return.

Once your return is completed you will be notified by email. A link to review the return and sign it via DocuSign will be sent. Prior to signature, any questions will be answered by a VITA volunteer.

Your return will not be e-filed until we have your required information and legal consent to e-file! Once your return is e-filed, you can track acceptance in your account. We are aiming for a 7-10 day turn around.

## Please Note

- This Mobile App was designed for commercial tax preparation offices and certain features are not supported by our free volunteer service.

- We do not offer refund anticipation loans! When creating your account, respond “NO” when asked if you want an advance on your refund.
- We can only offer extremely limited **if any** technical assistance with this App or your technical issues. Please do not use this Mobile App if you are unable to use the technology independently.
- **Images** are best uploaded as \*.jpg or \*.png. Check quality before you upload!
- **Documents** are preferred as PDF’s, but we can deal with GOOD quality legible images. Check quality before you upload!
- The categories for submitting documents are not highly detailed. For example, some information from multiple forms is on consolidated statements such as Consolidated Brokerage Statements. Others have no category. Just put them all under the category “Other” at the bottom of the choices when adding additional forms or information.
- When selecting your preferred contact method, be aware that **we will not use text messaging**. “Message Preparer” function in the system is not available.
- To preserve privacy, volunteers may block caller ID by inputting \*67 prior to calling you. Calls may appear as “anonymous”, “unknown caller”, or “private number”. If you prefer not to answer your phone, you should opt for email exchanges and check your email frequently.