VITA Document Descriptions/Instructions
Mesa United Way VITA Program

Advanced Pickup of VITA Documents - Time can be saved by filling out the required VITA client documents in advance of your Drop-off meeting. Please see “VITA Client Instructions”.

Please find the following documents attached to your email or downloaded from the Mesa United Way website:

IRS 13614C – Pages 1-4
This is the primary form that the taxpayer fills out. Please complete all pages.

Page 1 provides demographic information including names (legal names as on Social Security Cards or ITIN letters), birth-dates, address, phone numbers, and relationships. Only include individuals who are living with you and that you will be claiming as dependents.

Page 2 is a checklist to identify the types of income and expenses that you may have. You should have documentation for all income and expenses. Also check the “Life Events” section for special tax issues or situations.

Page 3 asks questions about your filing options, payment/refund methods, and some more demographic survey questions.

Page 4 gives you an option that only affects your return preparation next year. If you come back to the same VITA site next year, the site will have your basic demographic information in the system “carried forward” from this year. This makes preparation of your return quicker, easier, and often more accurate. Your correct names, tax IDs, addresses, and birth-dates will already be in the system. But if you go to another VITA site they will have to start all over. If you sign this page then your information will be “globally carried forward” to all VITA sites. We recommend you sign this but it is totally your option.

Consent to Disclose & Consent to Use
These are two almost identical pages that we ask you to sign. This gives us the ability to include the refund and tax credit amounts from your return with the totals for all of the other clients at the site so that we can report the results of the program to partners, funders and the public. This is important for us to receive grants and other funding to help pay for this free tax service. No personal identifying information such as name, address, phone number, date of birth, or Social Security Numbers will be used or disclosed for any purpose. Again, we request your approval but it is totally your option.

IRS Form 14446 - Virtual VITA/TCE Taxpayer Consent – Pages 1-3
This form states that you agree to leave your tax document with our VITA program team in order to prepare your taxes. This form must be signed on page 3 in order for us to prepare your taxes.