

Scan & Go VITA Tax Assistance, Sign Up Early!

The IRS Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs offer free basic tax return preparation

if you have one of the following:

- *earning \$57,000 or less*
- *disabilities*
- *limited English speaking*

The TCE program offers free tax help for those 60 years of age and older, specializing in pensions and retirement issues.

While the IRS manages VITA and TCE, the sites are managed by IRS partners and staffed by volunteers who want to make a difference in their communities. The IRS-certified volunteers are often retired individuals associated with non-profit organizations that receive grants from the IRS. VITA/TCE is not only free, but a reliable and trusted source for preparing tax returns.



**Earn it!
Keep it!
Grow it!**



Volunteer Income Tax Assistance Program

Eva Berumen, LERN Success Coach, brainstormed solutions and is set to partner with Goodwill, bringing VITA to the workplace in Oceana County.

Limited availability - sign up early January.

Due to Covid-19, some VITA sites are closed. Sign up as soon as possible and by mid-January to reserve a slot.

Call the IRS to find a location near you: 888-227-7669, or United Way's 211.

New! Scan & Go. When you call to set up your slot, you will be given a time to drop off your documents for scanning. Once finished, you be given a time to pick them up and sign for filing.

Success Coach goes the extra mile.

Eva Berumen, Success Coach (*Lakeshore ERN of Oceana County*) heard about Goodwill of West Michigan as a Scan & Go VITA site this year. She offered to meet with her ERN employees to do the secure scanning and

uploading so preparers could access. "In the past, we have had less people taking advantage of VITA who could be," said Eva. "I thought I could help bring VITA to employees right at the workplace. This way, they don't have to stress over trying to schedule an off-site appointment around their work hours."



Community

Partnerships. Amanda Kitchka, Program Assistant (*Goodwill of West Michigan*), is thankful employees will be served thanks to some creative thinking. "Eva's participation saved our ability to serve Oceana County," said Amanda. "We didn't want to see that area go without service."

Soaring to Success Employer Resource Network®

Our Goal

Creating access and resources for employee success at work and in life.

Member Companies

- ◆ Choices in Community Living
- ◆ Graceworks Enhanced Living - Dayton
- ◆ Graceworks Enhanced Living - Cincinnati
- ◆ Kingston of Miamisburg
- ◆ Matandy Steel & Metal Products

Strategic Partners

- ◆ ERN Ohio
- ◆ ERN USA
- ◆ Day Air Credit Union
- ◆ SELF

Help at the workplace.

If you are unable to locate a VITA site near you or have questions, contact your Success Coach for assistance. If they currently have Covid-19 onsite restrictions, they can meet with you by phone or video conferencing. *Sources: ERN USA, LERN, Goodwill of West Michigan*

Mika Hanson-Edwards
Success Coach
mhanson-edwards@selfhelps.org
513-953-8674 (cell)

Your company offers Success Coaching services to assist with any personal, home or work challenge. You succeed - your company succeeds!

Choices in Community Living

1651 Needmore Rd, Dayton

- ◆ Tuesday: All day

Graceworks Enhanced Living

6451 Far Hills Ave, Dayton

- ◆ Monday: All day
- ◆ Wednesday: Morning

Graceworks Enhanced Living

11370 Springfield Pk, Cincinnati

- ◆ Thursday: Morning

Kingston of Miamisburg

1120 Dunaway St, Miamisburg

- ◆ Wednesday: Afternoon

Matandy Steel & Metal Products

1200 Central Ave, Hamilton

- ◆ Thursday: Afternoon

Walk-in Welcome

Call, email or text for appointments. Off-site meeting locations available. Request additional times if needed.

Check with your Success Coach for current onsite availability due to Covid-19 - available remotely!



New Scan & Go VITA: Include All Documents

This year, with VITA preparation relying on scan/drop off and less sites and appointments, organize fully and early for a smooth process:

- Proof of identification (photo ID)
- Social Security cards for you, your spouse and dependents (an Individual Taxpayer ID Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents if you do not have a Social Security number)
- Proof of foreign status, if applying for an ITIN
- Birth dates for you, your spouse and dependents on the tax return
- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers
- Interest and dividend statements from banks (Forms 1099)
- Health Insurance Exemption Certificate, if received
- A copy of last year's federal and state returns, if available
- Proof of bank account routing and account numbers for direct deposit such as a blank check
- Total paid for daycare provider and the daycare provider's tax identifying number such as their Social Security number or business Employer ID Number
- Forms 1095-A, B and C, Health Coverage Statements
- Copies of income transcripts from IRS and state, if applicable

Sources: *USA ERN*; www.irs.gov

Covid-19: When to Quarantine

"If you've been exposed to someone who has tested positive, contact HR to discuss next steps," says Mika Hanson-Edwards, Success Coach (*Soaring to Success ERN*).

Who needs to quarantine?

- People in close contact with someone who has COVID-19 - excluding people who have had COVID-19 in the past 3 months
- People who have tested positive for COVID-19 do not need to quarantine or get tested again for up to 3 months as long as they do not develop symptoms again
- People who develop symptoms again within 3 months of their first bout of COVID-19 may need to be tested again if there is no other cause identified for their symptoms

What counts as close contact?

- You were within 6 feet of someone who has COVID-19 for a total of 15 minutes or more
- You provided care at home to someone who is sick with COVID-19
- You had direct physical contact with the person (hugged or kissed them)
- You shared eating/drinking utensils
- They sneezed, coughed, or got respiratory droplets on you

Steps to take.

- Stay home for 14 days after your last COVID-19 contact encounter
- Watch for fever (100.4°F), cough, shortness of breath, or other symptoms of Covid-19

Sources: *CDC*; *ERN USA*;

Soaring to Success ERN

Philosopher's Square

"You are never too old to set another goal or dream a new dream."

- CS Lewis