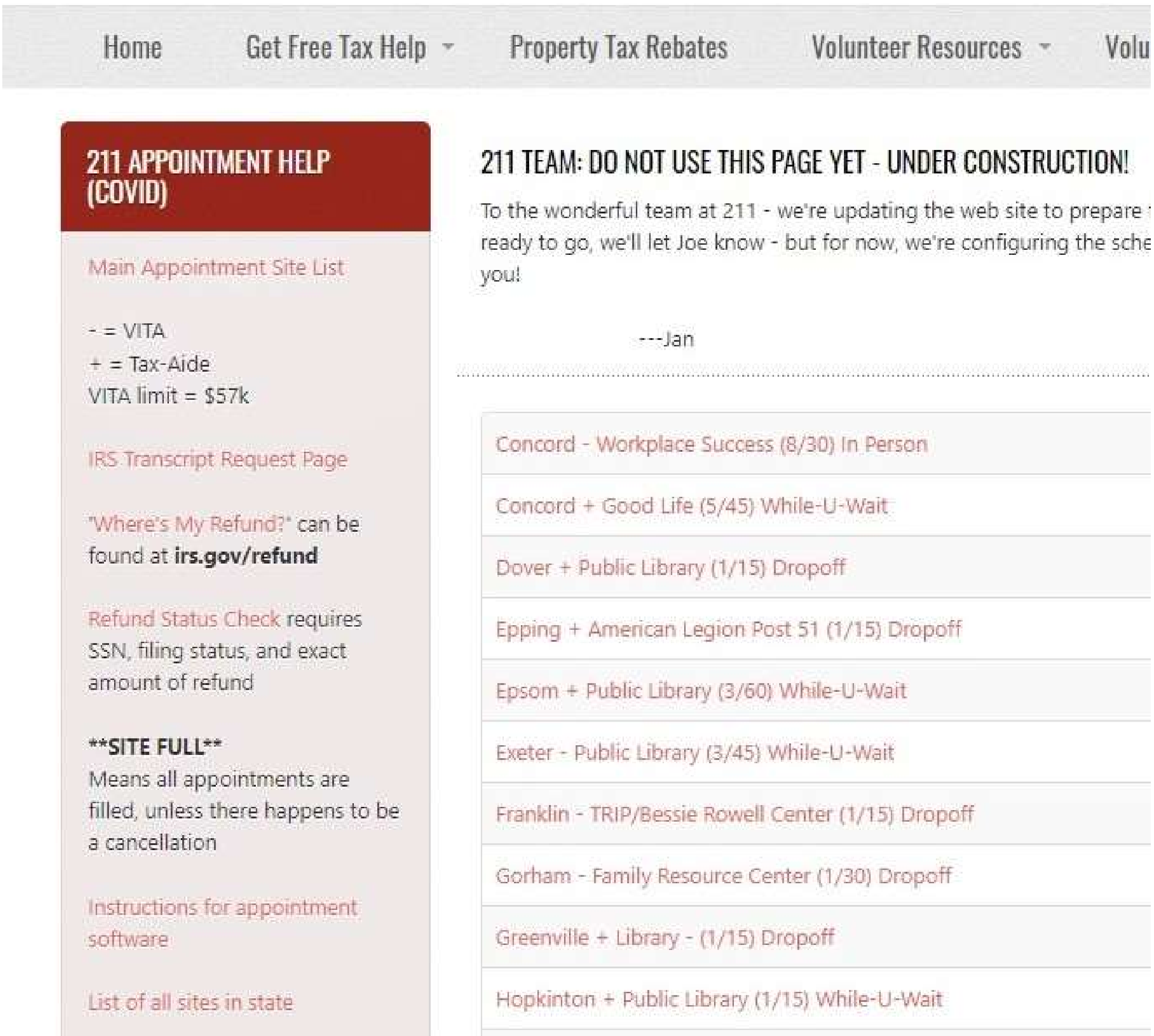
Detailed Instructions for 211 Staff

The 211 Scheduling Page

To simplify scheduling for 211 staff as much as possible, a custom web site is provided at http://nhtaxhelp.org/211 . A link to these instructions is included on the page.



This page includes a complete listing of sites for which 211 can schedule appointments. Each site is listed as follows:

City (+/-) Host Name (concurrent appointments/appointment duration) Appointment Type

A ‘+’ separator denotes Tax-Aide sites, while a ‘-‘ denotes VITA sites.

An ‘In Person’ appointment type is self-explanatory.

A ‘Dropoff’ appointment type indicates a drop off appointment with paperwork/return pick up at a later date. It is important to let clients know that they will drop off their paperwork one day and will be scheduled to return at a later date (typically a week) to pick up their paperwork and sign their return.

A ‘While-U-Wait’ appointment type indicates a drop off appointment with paperwork/return pickup at a time later the same day with a wait time of approximately the appointment duration in length.

Using the Dover site in the above example, we can tell that Dover is a Tax-Aide site located at The Dover Public Library. They handle 1 drop off appointment at a time with a drop off appointment duration of 15 minutes. The site will schedule clients to return at a later date (typically a week) to pick up their paperwork and sign their return.

Using the Exeter site in the above example, we can tell that Exeter site located at the Exeter Public Library. They can handle 2 clients concurrently with a wait of approximately 45 minutes between drop off of their paperwork return of their paperwork/return.

To schedule a client or learn more about a given site, simply click on it.

The Site Page for 211 Scheduling

Clicking on a site on the 211 scheduling page takes you to a site page:

211 APPOINTMENT HELP (COVID)

Main Appointment Site List

- = VITA
+ = Tax-Aide
VITA limit = $57k

IRS Transcript Request Page

'Where's My Refund?' can be found at **irs.gov/refund**

Refund Status Check requires SSN, filing status, and exact amount of refund

****SITE FULL****
Means all appointments are filled, unless there happens to be a cancellation

Instructions for appointment software

List of all sites in state

211 TEAM: DO NOT USE THIS PAGE YET - UNDER CONSTRUCTION!

To the wonderful team at 211 - we're updating the web site to prepare for the upcomi ready to go, we'll let Joe know - but for now, we're configuring the scheduler and the you!

---Jan

Greenville + Library - (1/15) Dropoff

Th 9:00AM - 11:00AM

Feb-03 - Apr-15
One appointment at a time, 15 minutes each
All times displayed are valid times

Schedule Today - Choose a date

Jan			February 2022			Mar
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28					

Go to top

On this page are included the days and hours of operations, as well as the maximum number of concurrent appointments and the appointment duration. This gives you a quick point of reference to help clients find an appointment that works for them.

Only valid dates and times for appointments are displayed. If a given day or time is fully booked, it will appear as 'unavailable' and be greyed out.

Sample Email Sent to Client

If an email is included with the appointment information, the client will be emailed twice: once immediately after scheduling, and a second time 24 hours before their appointment. Both emails are the same. The example below is the standard letter as of 2017-Jan-02.

Dear [CustomerFirstLastName]

Thank you for making an appointment for free tax preparation via New Hampshire 211 and nhtaxhelp.org! We look forward to helping with your tax return at **[ServiceProvider]** on **[AppointmentDateDW], [AppointmentDate] at [AppointmentStartTime].**

If you no longer need your appointment, please be courteous and dial 2-1-1 to cancel your appointment so our volunteers can serve others.

If possible, please print and fill out the first two pages of this Intake Form

Please read everything below; the more information you bring, the more accurately we can prepare your return. **WHEN YOU COME FOR YOUR APPOINTMENT, YOU MUST BRING:**

- If married, it is preferable for both spouses be present
- Original (or photocopy of) social security cards for taxpayer, spouse (if married), and any dependents being claimed
- Picture ID for taxpayer and spouse (must be a Driver's License, or state issued ID Card, or other official document)
- All W-2's for all places worked in previous year
- Prior year tax return if applicable
- Routing number and bank account number for direct deposit

If applicable, bring:

- **If you're not sure, bring it! We'll be happy to review it.**
- Copies of any 1099's issued to you or you spouse (including social security!)
- Form 1095A if you received or purchased insurance via healthcare.gov
- Bank account interest year-end statement
- Student loan interest statement
- Proof of child care expenses paid (statement from provider with EIN # or Social Security #)
- Statement of post-secondary education tuition expenses paid
- Any other documents related to your previous year taxes.
- Copies of last year's mortgage interest statements (including any points paid)
- Real estate taxes paid statement
- Proof of charitable donations
- Statement of work-related expenses
- Auto registration
- Receipt of tax preparation fees paid last year
- Statement of safe deposit box fees
- Statement of union dues paid
- Any other statements of allowable itemized deductions
- If small business owner: Proof of income and expenses (in writing)

Please note that our volunteers are trained and certified by the IRS on a very specific range of tax forms and issues; some tax matters are considered 'out of scope' and we cannot prepare such returns.

Things that are Out-of-Scope include, but are not limited to:

- Schedule C (Business Profit and Loss) other than that allowed under C-EZ rules but up to $25,000 expenses
- Complicated Schedule D or without proper paperwork (Capital Gains and Losses)
- Schedule E (Rental Property) with expenses, including depreciation
- 2106 (Employee Business Expense)
- 3903 (Moving Expenses)
- 8615 (Minor's Investment Income)
- Portions of Schedule As and Bs that are not included in our training
- Schedule K-1s that involve depreciation or expense
- Other rental income or business income