

Pre-Appointment Packet Contents

Pre-Appointment Packets, though not required, are suggested to limit the amount of time that the taxpayer will remain in the site.

Pre-Appointment Packets be at a minimum, contain all required forms that we ask the taxpayer to fill out during their appointment and information on the return preparation process. It can also contain supplemental worksheets that allow the taxpayer to summarize their tax information. See the Drop-Off Best Practice and FAQ document for additional information on Pre-Appointment Packets.

All items listed below could be part of a Pre-Appointment Packet. Those in **Purple** are those that would make up the smallest recommended packet.

Packets that are distributed by mail or picked up in person include documents that volunteers will obtain by ordering them through the Volunteer Portal Orders tab or physically printing out the form from the templates below. For packets are emailed, the documents below can be attached directly to an email after being edited.

All items listed are found in the volunteer Portal Libraries:

Service Delivery Model > Drop-Off Models > Forms and Tools

Document Name	Editable by Site?	Sub-folder where document is located
How Your Return Will Be Prepared	Yes	Pre-Appointment Packet
Explanation of Form 14446	No	Form 14446
IRS Form 14446	Partially	Form 14446
Documents We Need	No	Pre-Appointment Packet
AARP Foundation Tax-Aide Intake Booklet (fillable)	No	Pre-Appointment Packet
Economic Impact Payments Worksheets	No	Pre-Appointment Packet
Locally prepared Supplemental Information Sheets	N/A	Locally Created – Not included in Library
Self-Employed Sch C Worksheet (NTTC created)	No	Pre-Appointment Packet
Schedule A Itemized Deduction Worksheet (NTTC created)	No	Pre-Appointment Packet
Education Credit Worksheet (NTTC created) (If site prepares these returns)	No	Pre-Appointment Packet
S-E COVID Worksheet (NTTC created) (If site prepares these returns)	No	Pre-Appointment Packet