WEEK 3 P+P TAX TIP: CUSTOMER CONSENTS

Overview:

All three intake forms at P+P sites ask customers to provide their consent. Read on to learn more about what the different consents mean and where to input them.

Resources:

- Preparers have a handout called "Permission to Use Your Information" which can help you explain the consents to customers.
- The newly updated self-paced training on intake/interview and quality review
- 2024 Volunteer Tax Manual, pages 28 and 34.

P+P Tax Data Consents

On page 2 of the P+P tax intake sheet, customers respond to three consent questions.

If a customer has marked No on *any* of the three consents, let them know:

- We *cannot e-file their return* or keep a copy unless they mark **Yes** on all three.
- However, we can still prepare the return and they will mail it after they leave.
- Let them know that we don't share any of their identifying info – only things like total amount of customer refunds or average customer income. This helps us report to funders about the work we do!
- Give the option to change their response. Update answers on the form if needed.

PERMISSION TO USE YOUR INFORMATION

Review the Prepare + Prosper (P+P) Permission to Use Your Information handout and the consents below.

If you choose "no" for any of these consents, P+P cannot e-file your tax return, and you will receive paper copies to sign and mail.

• P+P may keep an electronic copy of my tax return for up to 6 years.	☐ Yes	☐ No
• P+P may use anonymous data containing tax return dollar amounts for marketing, fundraising, or other non-fundraising activity. This allows us to count you in our statistics when we apply for funding or share data with our partners. We do not use personally identifiable information.	☐ Yes	☐ No
• P+P may disclose my tax return information to TaxSlayer (our tax preparation software) to e-file my tax return, and TaxSlayer may disclose my tax return information to P+P for follow-up.	☐ Yes	☐ No

Taxpayer signature ______________________ Date ________

Spouse signature ______________________ Date ________

In the E-file section (Taxpayer Consent), scroll down to choose **Accept** for each.

Required questions are 1, 2, & 4.

IRS Global Carryforward

The data consent on page 6 of the IRS intake sheet allows global carryforward.

- **This is OPTIONAL for customers.**
- Allows any VITA site to pull forward basic return info and save the customer time when they file next year.
- Customers may sign to opt in or leave it blank to opt out, and it does not impact their return in any way this year.
- This is the first consent you will enter in TaxSlayer (see more on page 34 of the Volunteer Tax Manual).

Form **15080** (October 2024)

Department of the Treasury - Internal Revenue Service

Consent to Disclose Tax Return Information to VITA/TCE Tax Preparation Sites

Federal Disclosure:
Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

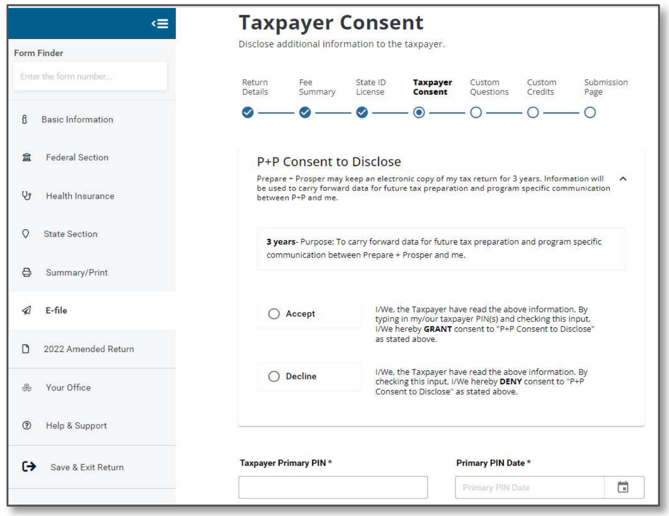
You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Terms:
Global Carry Forward of data allows TaxSlayer LLC, the provider of the VITA/TCE tax software, to make your tax return information available to ANY volunteer site participating in the IRS's VITA/TCE program that you select to prepare a tax return in the next filing season. This means you will be able to visit any volunteer site using TaxSlayer next year and have your tax return populate with your current year data, regardless of where you filed your tax return this year. This consent is valid through November 30, 2026.

TaxSlayer Data Entry

Consent information is tracked in the E-File section of TaxSlayer.

- Mark each P+P consent and the IRS Global Carryforward as **Accept** or **Decline** based on the customer's responses from the intake sheets.
- For the PIN number, enter the customer's zip code.



Financial Services consent

CSVs should make sure customers sign the Boost Your Money form, if they are interested in any options or referrals to financial services.

For example, customers need to sign to enter the Save + Win contest or get connected with a money mentor.

This consent does not get entered into TaxSlayer.

Consent to share information

By signing below, I give Prepare + Prosper consent to share the above contact information with the organization(s) I am requesting referrals for. This consent is valid for one year from today.

Signature: ________________________________ Date:______________

Can we text you regarding your financial referrals*? ☐ Yes ☐ No

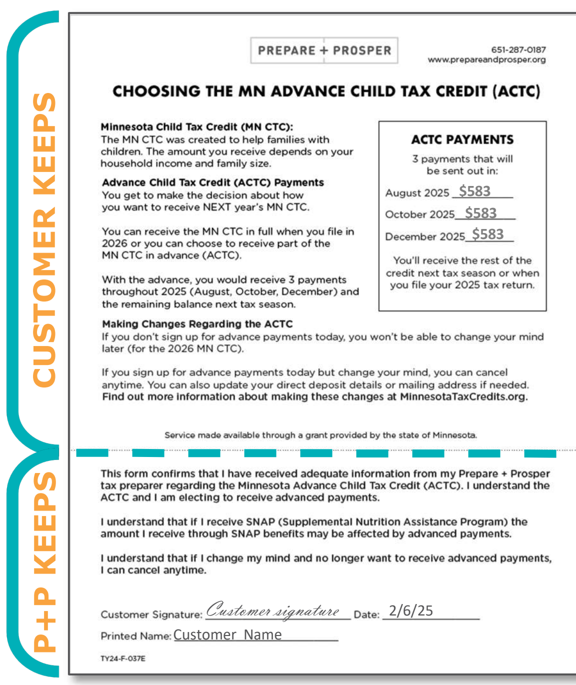
*We will never send any sensitive financial information or any personally identifiable information via text.

STOP HERE! OFFICE USE ONLY!

ACTC Opt-in Consent

As mentioned in the week 2 tax tip, this form is used for customers who choose to receive the new Advance Child Tax Credit Payments. Here's a recap:

- Customers sign the bottom to give consent and confirm they want the advance payments.
- Reviewers tear off the bottom signature section and staple it on top of Form 8879. P+P keeps as proof of customer consent.
- CSVs give the top section to the customer for their records.



CUSTOMER KEEPS

PREPARE + PROSPER

651-287-0187
www.prepareandprosper.org

CHOOSING THE MN ADVANCE CHILD TAX CREDIT (ACTC)

Minnesota Child Tax Credit (MN CTC):
The MN CTC was created to help families with children. The amount you receive depends on your household income and family size.

Advance Child Tax Credit (ACTC) Payments
You get to make the decision about how you want to receive NEXT year's MN CTC.

You can receive the MN CTC in full when you file in 2026 or you can choose to receive part of the MN CTC in advance (ACTC).

With the advance, you would receive 3 payments throughout 2025 (August, October, December) and the remaining balance next tax season.

ACTC PAYMENTS

3 payments that will be sent out in:

August 2025 $583

October 2025 $583

December 2025 $583

You'll receive the rest of the credit next tax season or when you file your 2025 tax return.

Making Changes Regarding the ACTC
If you don't sign up for advance payments today, you won't be able to change your mind later (for the 2026 MN CTC).

If you sign up for advance payments today but change your mind, you can cancel anytime. You can also update your direct deposit details or mailing address if needed. **Find out more information about making these changes at MinnesotaTaxCredits.org.**

Service made available through a grant provided by the state of Minnesota.

P+P KEEPS

This form confirms that I have received adequate information from my Prepare + Prosper tax preparer regarding the Minnesota Advance Child Tax Credit (ACTC). I understand the ACTC and I am electing to receive advanced payments.

I understand that if I receive SNAP (Supplemental Nutrition Assistance Program) the amount I receive through SNAP benefits may be affected by advanced payments.

I understand that if I change my mind and no longer want to receive advanced payments, I can cancel anytime.

Customer Signature: Customer signature Date: 2/6/25

Printed Name: Customer Name

TY24-F-037E

Should be entered in TaxSlayer

State section, MN Return, Credits, Working Family Credit (Schedule CWFC), and select **Yes.**