

2025 P+P TAX CLINICS

HUDDLE NOTES - WEEK SEVEN

TAX TIPS:

This week's tax tip is about Medicaid Waiver payments. Did you know that caregivers may receive medicaid waiver payments, which are usually reported on a W-2, and in some cases that income is not taxable? Read on to learn how to identify these payments and what choices taxpayers have when reporting them.

Education Credit Reminder

Preparers need to complete the education credit worksheet when maximizing the AOC credit and submit it with their returns for review so the reviewer is clear on how the amounts were calculated.

Money Mentors Financial Health Challenge

The Financial Health challenge has begun but people can sign up anytime between now and April 15, each week is a new challenge to help review, prioritize and organize personal finances with opportunities to win gift cards along the way. Give out a brochure or connect customers with the QR codes.

P+P Merch

If you've always wanted your very own P+P t-shirt, hat, or hoodie, the communications team is hosting an online P+P store where we can purchase P+P merch. If you are interested, check out the link in the weekly email. For volunteers who have already made a purchase, we are currently coordinating bringing items out to sites. Thank you for your support!

Customer needs to add documents to a pending return:

Do not give the QR code to customers to submit follow-up documents after the appointment. The "Documents to Print" folders are cleared out after every shift and there is no good way to connect a customer's documents back to their return after their appointment – have them make a new "Review Only" appointment or call the tax line 651-262-2167 if there are extenuating circumstances.

Miscellaneous Notes:

- Next round of appointments opens: March 10, then March 24 which is the last large appointment block that will open this tax season

Let's Talk Numbers (2024 electronically filed returns only)

SITE	LAST WEEK	TOTAL FOR THE SEASON
CAPI	27	166
CRECIMIENTO LATINO	10	42
ESNS	33	176
GREEN CENTRAL	33	178
HALLIE Q BROWN	16	112
MERRICK	40	187
MAIN OFFICE (includes SE)	194	1045
URBAN LEAGUE	32	169
VEAP	36	202
REMOTE	31	50

THANK YOU!!!!