

PaycheckPLUS

Did you already prepare and file your own taxes, or using a different tax preparer (not United Way VITA)?

That's OK – You Can Still Apply for Your Paycheck Plus Bonus

Here is all you need to do:

- File your taxes with the IRS.
- Wait at least 2 weeks after the IRS receives your tax forms.
- Bring the following to a United Way Paycheck Plus VITA site:
 1. A government-issued picture ID
 2. A complete copy of your Tax Year 2016 tax forms that you sent to the IRS in 2017. This includes:
 - a. Form 1040 (or 1040A or 1040EZ)
 - b. Copies of all of your W-2 forms and any other earnings statements
 - c. If you were self-employed: a copy of Schedule C
 3. To prove that the IRS or the State accepted your tax forms, choose one of the options described on the Paycheck Plus sheet called:
How to Show Proof that the IRS or the State Accepted Your Tax Forms.
- Select a Payment Method for your bonus before you leave the United Way Paycheck Plus VITA site

PaycheckPLUS

How to Show Proof that the IRS or the State Accepted Your Tax Forms

To approve your Paycheck Plus bonus, Paycheck Plus may need this proof in these situations:

- If you prepared your taxes on your own, or someplace other than United Way VITA free tax prep site
 - OR
 - If United Way VITA prepared your taxes but you had to file your taxes by paper (mailed to IRS).
 - OR
 - If United Way VITA filed your taxes but the IRS says they rejected your tax forms. (If so, you may need to work with If United Way VITA or the IRS to make tax corrections before you can do the following steps. Please ask the If United Way VITA tax staff what you need to do to fix your tax forms so that the IRS will accept them.)
-

Paycheck Plus offers three options for proving that your tax forms have been accepted by the IRS or the State:

Option 1 – If you are getting a refund from IRS

- a. File your taxes with the IRS.
- b. Wait at least 2 weeks after the IRS receives your tax forms.
- c. Print the “Refund Status Results” page from www.irs.gov/Refunds. (Where is My Refund?)
 - The results page must show “Refund Approved”
 - The Refund Amount must match the refund amount on your 1040
 - If you did not wait at least 2 weeks, it might be too soon for this information to show on the IRS web site

Option 2 – If you owed money to the IRS:

- a. Bring a 2017 letter or statement from the IRS showing the amount you owe.
 - The amount you owe should match the amount you owe on your 1040
- OR
- If your refund was taken for back taxes or other debt, somewhere on the letter should list the refund amount that was on your 1040
- b. File your paper return in person at an IRS office and bring a stamped copy back to Paycheck Plus

Option 3 – If you are getting a refund from the State of Georgia:

- a. Visit <https://dor.georgia.gov/wheres-my-refund>
 - Click on the link called [Check the status of your refund](#) and fill in the information it asks for
 - The results page must say that the refund was approved
 - The Expected Refund Amount must match the refund amount on your Georgia tax form that you filed
 - Your earnings on the Georgia tax form must match the earnings on your IRS 1040