

PaycheckPLUS

Did You File Your Taxes at a Food Bank Self-Prep Site? Or File Your Taxes Somewhere Else?

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 Food Bank Paycheck Plus VITA site:
 1. A government-issued picture ID
 2. A complete copy of your Tax Year 2016 tax return 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 return, 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 Return.
- Select a Payment Method for your bonus before you leave the Food Bank Paycheck Plus VITA site

PaycheckPLUS

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

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

- If you prepared your taxes at a Self-Prep site or someplace other than Food Bank.
 - OR
 - If Food Bank prepared your taxes but you had to file your taxes by paper (mailed to IRS).
 - OR
 - If Food Bank filed your taxes but the IRS says they rejected your return. (If so, you may need to work with Food Bank or the IRS to make corrections before you can do the following steps. Please ask the Food Bank staff what you need to do.)
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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 New York:

- a. Print the results page from www8.tax.ny.gov/PRIS/prisStart
 - The results page must say that the refund was approved
 - The Requested Refund Amount must match the refund amount on your IT-201 or other NY State tax form
 - Your earnings on the NY State tax form must match the earnings on your 1040