



**Department of
Taxation and Finance**

Available Services Offered by NYS-DTF

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Outreach Specialist, *Office of the Taxpayer Rights Advocate*

Tax Literacy

1. Why do we pay taxes?
2. Forms to complete for your employer
3. What's a W-2 or a 1099-MISC?
4. Estimated tax payments
5. What is a tax refund?
6. Income tax credits
7. Free file services
8. Paid preparers
9. Identity theft
10. Refund anticipation loans and checks
11. Refund options/Payment options

Income Tax Credits

- Household Credit
- Family Tax Relief Credit
- IT-209 Noncustodial Parent EITC
- IT-213 Empire Child Tax Credit
- IT-214 Real Property Tax Credit
- IT-215 Earned Income Tax Credit
- IT-216 Child Care and Dependent Care Credit
- IT-245 Volunteer Firefighter & Ambulance Worker Credit
- IT-249 Long Term Care Credit
- IT-258 Nursing Home Credit
- IT-272 College Tuition Credit
- IT-112-R Resident Tax Credit

Electronically Filing (E-File)

- Nearly 90% of New Yorkers qualify
- File both Federal and State Income Tax returns
- Safe and secure encrypted transmission
- Instant confirmation of submission
- Savings on preparation fees

Free e-File Options

- **NYS Web-file** - File your State tax return with no income limit
- **DTF Hosted FSA** - File both Federal and State tax returns if your 2015 FAGI income is \$62,000 or less with assistance from a tax department employee
- **FSA** - Self prepare both Federal and State return if you 2015 FAGI household income is \$62,000 or less
- **VITA** - Offers free tax preparation to most taxpayers with income less than \$54,000
- **AARP** – Offers free tax preparation to taxpayers with low to moderate income
- **TCE** - Offers free tax preparation to taxpayers who are age 60 or older with no income restriction

NYS Web-File

- Confidence with tax law and computer literate
- Full year NYS resident
- Online Services Account
- No income restriction but limited credits
- Must file your Federal return with IRS

DTF Hosted Facilitated Self-Assisted (FSA)

- Uncomfortable with tax law and computer literate
- Many sites across the state
- Assistance with software
- Both Federal and State Income tax returns
- 2015 FAGI of \$62,000 or less

Facilitated Self-Assisted (FSA)

- Computer literate and comfortable with tax software
- Access anywhere with Internet access
- Both Federal and State Income tax returns
- 2015 FAGI of \$62,000 or less
- www.tax.ny.gov or www.myfreetaxes.com

Volunteer Income Tax Preparation (VITA)

- Uncomfortable with tax law and not computer literate
- Traditional one to one interface
- IRS Certified Volunteers
- Both Federal and State Income tax return
- 2015 FAGI of \$54,000 or less

AARP / TCE

- Uncomfortable with tax law and not computer literate
- Traditional one to one interface
- AARP IRS Certified Volunteers
- Both Federal and State Income tax return
- No income restrictions to taxpayers over 60

Tax Preparation Sites

- For Online Services or to web file your State return:
www.tax.ny.gov
- To locate a FSA site hosted by the NYS Tax Department:
www.tax.ny.gov/fsa (click on your region)
- To locate a VITA site nearest to you:
www.irs.gov (enter key word VITA) or call **1-800-906-9887**
- To locate an AARP or TCE Tax Aide site nearest to you:
www.irs.gov (enter key word VITA) or call **1-888-227-7669**

What to bring

- Proof of Identification
- SS# or ITIN
- Birthdates
- Wage and earning statements (W-2's, W-2 G, 1099-R & 1099-MISC)
- Interest and Dividend Statements
- Form 1095 A, B or C Health Insurance Statement
- Health Insurance Exemption Certificate (if received)
- Information related to credits you are claiming
- Bank account routing and account numbers
- Copy of last years tax return

Paid Preparers

- **Before** you hire a tax preparer, you should ensure that he or she is registered with the IRS and New York State.
- Don't hire a tax preparer who asks you to sign a blank return.
- You should also review a list of fees and be wary of high interest rates if you are offered a loan in advance of your refund.

Scams

Example:

“I’m calling to help determine your eligibility for certain New York State tax credits. Please provide me with your social security number and date of birth so I can get that information for you.”

- Visit our website to obtain a valid phone number
- Contact us with any questions
- Attorney General Consumer Fraud and Protection Bureau
 - 800-771-7755
- NYS Department of State Division of Consumer Protection
 - www.dos.ny.gov/consumerprotection

Victims of Identity Theft

What to do:

- Visit our website at www.tax.ny.gov/help/contact/identity-theft.htm
- [Form DTF-275, Identity Theft Declaration](#)
- Fax items to (518) 435-2990 (Attn: Identity Theft) or mail to:
 - NYS Assessment Receivables (Attn: Identity Theft)
PO Box 4128, Binghamton NY 13902-4128
- Call (518) 457-5181

Online Service for Individuals (cont.)

- Respond to a bill or department notice
- E-mail alerts
- View Account Summary
- View payment history
- Watch demos and videos
- Withholding information

Received a Notice or Tax Bill?

Don't Ignore It!



**Questions?
Comments?**

