Module 11: TALKING TO TAXPAYERS:
Interview Skills

Special thanks to: Pennie Clayton of United Way of Tarrant County for her contribution to content provided in this module.
By the end of this module you will…

- Know how to greet and welcome your client to VITA
- Understand how to use the IRS Form 13614-C, Intake, Interview & Quality Review, to talk with your client
  - The Form 13614-C is used to engage your taxpayer in preparing an accurate return. An example can be found in the IRS Publication 4012, Volunteer Resource Guide, Tab B; Job Aid for Volunteers.
- Talk to taxpayers with confidence

At the end of this module, you will be prepared to talk with your tax client to ensure they will leave knowing their tax return was prepared with accuracy based on the information the taxpayer provided and your knowledge as the tax preparer. It is important that the taxpayer knows that they have been treated fairly and they understand their rights.
In this module…

- Welcome Your Client to VITA (Volunteer Income Tax Assistance)

- Using the IRS Form 13614-C (Interview & Intake Sheet) to Know Your Taxpayer
Talking to the Taxpayer

Treat and communicate with all taxpayers in a professional, courteous, and respectful manner.
### Greeting Taxpayers

- Greet taxpayers with a smile and give eye contact and introduce yourself (Hi my name is _____ and I will be preparing your taxes today.)
- Ask the client for their packet (13614-C, tax forms, etc.)
  
* Make sure the tax return is within scope of service and the correct certification level. Make sure all required consent forms are signed by the client(s). This should be done at the Intake process, but always double check!
- Ask the taxpayer (and spouse, if applicable) for their photo ID & Social Security card(s), ITINs, and Social Security cards for dependents if applicable.

- Let the taxpayer know you may ask questions to ensure that you are entering the correct information for accuracy of their tax return.
Building Rapport

Starting a tax conversation with the taxpayer.
Use Small Talk As A Frame Around Tax Conversations

- Start with small talk. Ask the taxpayer(s) how are they doing. If they have their family with them, greet the family members. Ask the family members how they are doing.

- Use the taxpayer’s name in your conversations. You are more likely to get a positive response when you use the person’s name you are talking with.

- Always be a good listener. Make eye contact and respond with verbal cues to show the taxpayer you hear what they are saying.

- When you are talking with the taxpayer(s), don’t leave the conversation too quickly. If the client mentions a child graduating high school, pick up on the cue and dig deeper. Ask if the child will be attending college. If so, what college? Use just enough conversation to let the taxpayer know they are important during the time they are spending with you as a tax preparer.
Talk with the Taxpayers

As you are entering the taxpayer information, occasionally talk to the taxpayer.

Example 1:
Preparer: “How are you doing today? My name is ________. Thank you for choosing our VITA site. Is this your first time here?”
Taxpayer: “Yes, I saw a flyer about VITA at a community center. I met the requirements and decided to come.”
Preparer: “I am glad you did, and we hope after today you will come back next tax season. May I please see your tax documents, photo ID, Social Security card and Social Security cards of your dependents?”

Example 2:
Preparer: “How are you doing today? Thank you for choosing our VITA site. Is this your first time here?”
Taxpayer: “Oh no, I have been coming here for three years. My son is here also. We both use VITA. Here is everything you need.”
Preparer: “Thank you, ________. “Let’s get started entering your tax information. Do you have any questions, ______________, before we get started?”
Being Confident In Your Conversation

The goal is to connect with the taxpayer
Talking to Taxpayer with Confidence During Tax Preparation

- Speak with the taxpayer(s) in a slow voice and at a tone that is not loud. The taxpayer will be able to hear you and understand what you are saying.

- Don’t rush your responses; give the taxpayer time to complete their response to your questions.

- Try to eliminate filler words like “ummm” and “like.”

- Be relaxed when speaking to the taxpayer. If you are tense, this will appear in your body language and your tone of voice.
Example 3:

**Preparer:** “John, based on your son’s birthday, he is not eligible anymore for the child tax credit. The IRS requires the child be under the age of 17 to receive this credit.”

**Taxpayer:** “A friend told me that I can claim him up to age 24.

**Preparer:** “Your friend may have gotten confused about the education credit. This credit will be based on your filing status, student enrollment status, adjusted gross income, who paid college expenses and other factors. If your son decides to attend college, we would be happy to help you with this filing.”

**Taxpayer:** “Thanks, Joyce, for giving me the correct information. If my son decides to attend college, I will let you know. Where can I learn more about this?”

**Preparer:** “Go to [www.irs.gov](http://www.irs.gov) and search education credits.”

Remember to talk to taxpayer with confidence and in a professional, friendly manner. Be relaxed; this will help the taxpayer to be at ease and trust your information.