



**United Way of the Wine Country
Earn it! Keep it! \$ave it! Free Tax Preparation Services
Stakeholder Conduct and COVID-19 Policy**

United Way of the Wine Country's Earn it! Keep it! \$ave it! Initiative (EKS) offers free tax preparation services to low-to-moderate income families, to assist them in building financial stability. We seek to grow these services so that more households in our region have access to the resources they need to build financial stability and thrive.

United Way is committed to providing a safe and accessible site for all EKS stakeholders -- staff, volunteers, clients, EKS Coalition partners, and 2-1-1 call-specialists. The safety, wellbeing, trust, confidentiality, and privacy of our stakeholders are of the utmost importance and essential to fulfilling our mission through this free service. Anyone who violates these standards is subject to dismissal and denial of our services.

We outline below the following Stakeholder Conduct and COVID-19 Policy. All EKS stakeholders are expected to adhere to the following:

- I. Standards of Conduct Creating an environment of Kindness, Safety, Respect, and Trust**
 - A. All EKS stakeholders are expected to always treat one another with kindness, both verbally and physically, always. This means that we will respect one another and conduct ourselves with professionalism, courtesy, respect, and dignity toward one another always.**
 - B. We will protect the confidentiality of others.**
 - 1. Photography is not permitted within or outside the tax site, except by United Way staff and only when permission has been granted. A United Way Media Release Form must be**

UnitedWeRise

#UnitedWeRise

#UnidosAscendemos

completed by all participants prior to any photography, videography or other recording.

2. Photographs of laptop screens and tax documents is not permitted.
3. Any stakeholder who fails to comply with these standards is subject to dismissal and removal from all EKS programs and denial of free tax preparation services.

II. COVID-19 Policy 2023 (subject to updating as needed)

A. **Masking Requirements** - For the protection of all stakeholders in all tax sites in the EKS Coalition, all United Way and EKS staff, volunteers, and clients are required to wear masks inside the service site during EKS tax clinic hours and whenever EKS tax clients are present.

B. **Proof of Vaccination Requirements** - For in-person appointments with EKS volunteers at **United Way, Rohnert Park Health Center, and Community Action Partnership**, all EKS clients must bring proof of COVID-19 vaccination and wear their masks throughout the entirety of their appointment, from intake through completion of the client survey.

- i. If an EKS client is unable to present proof of vaccination at **United Way, Rohnert Park Health Center, and Community Action Partnership**, they are invited to receive EKS free tax services by:
 1. Scheduling a “drop-off appointment;” or
 2. Rescheduling their tax appointment once they have proof of vaccination. Rescheduling is done by dialing 2-1-1.

II. EKS Documentation Requirements – EKS free tax preparation services cannot be provided without complete documentation as listed below.

A. All EKS clients are required to bring the following documentation to their scheduled appointment:

1. State issued identification card;
2. Original or copy of Social Security card and/or Taxpayer Identification Number;
3. Last year’s tax returns (2021);
4. All 2022 tax-related documents, including child-care expenses, and health insurance coverage information; and

UnitedWeRise

#UnitedWeRise

#UnidosAscendemos

5. Routing and account number of bank accounts for faster direct deposit refund.
- B. If an EKS client is unable to present the documentation listed above, they are invited to receive EKS free tax services by:
- i. Scheduling a “drop-off appointment” once they have needed documentation; or
 - ii. Rescheduling their in-person tax appointment by dialing 2-1-1.

End of Policy Statement