VIDEO INTERVIEW CHEAT SHEET

Your interview takes about 30 to 45 minutes. Here's how to make it quick and easy.

The day before

- Upload your documents and this organizer to your Document Vault. Your preparer reviews them before the call.
- Open your interview link from the email (efileunited.com/meet/). The room opens 30 minutes early; test your camera and microphone there.
- Use a current version of Chrome, Safari, Edge or Firefox on a phone, tablet or computer. Charge it, or plug it in.
- Married filing jointly? Plan for both spouses to join, at least at the end, so you can both review and sign.
- Need captions, a sign-language interpreter or Spanish? Tell us when you book. It costs nothing.

Have these within reach

- ☐ Photo ID (driver's license, state ID or
- ☐ All W-2s and 1099s
- ☐ Child care provider details
- ☐ Social Security cards or ITIN letters
- ☐ Voided check or bank letter (for direct
- ☐ 1095-A (Marketplace insurance)
- ☐ Last year's tax return
- ☐ IRS letters and IP PIN (if any)
- ☐ Self-employment organizer and

During the call

- Find a quiet, private spot with light in front of you, not behind you. Headphones help.
- Your preparer will verify your identity by asking you to hold your ID up to the camera.
- Never type a full Social Security or bank account number into the chat. Your preparer reads them from your documents.
- Share your screen only if your preparer asks, and close other windows first.
- Your interview, including video, audio and chat, is recorded and saved, encrypted, as part of your tax file. You'll see a notice and agree before you join.
- Ask anything. A good interview is a conversation, and there are no silly questions.

After the call

- Review your return in the portal. Your preparer explains your refund or balance due line by line.
- Sign Form 8879 electronically. Nothing is filed until you approve it.
- Track your return from IRS acceptance to refund in the portal.
- Proud of how easy it was? You can share a snapshot of your interview, with your preparer blurred, and invite friends to file with us.

We will never
Ask for your sign-in code or password, ask you to pay with gift cards, or call threatening arrest. If something feels off, hang up and call us at 614-418-1818 or 1-888-29-EFILE (3-3453).