

FREE TAX PREPARATION UHD VIRTUAL VITA



UHD'S VITA IS NOW ONLINE

The University of Houston-Downtown's **VIRTUAL Volunteer Income Tax Assistance (VITA)** program offers free tax help to people who make \$66,000 or less and need assistance in preparing their own tax returns. IRS-certified volunteers provide free basic income tax return preparation with electronic filing to qualified individuals.

HOW THE VIRTUAL TAX PREP PROCESS WORKS

01



STEP 1: See If You Qualify

Be classified as one or more of the following:

- \$66,000 Annual Income or Less
- Disabled
- College / University Students
- Senior citizen

02



STEP 2: Call for a Quick Consultation

Provide Your Email Address with your name and telephone number and VITA Coordinator will Send an Intake/ Interview Sheet (a 13614-C; or 13614-NR) for Completion.

VITA Clinic Phone: 713-222-5328

03



STEP 3: Return Interview Sheet & Gather Tax Documents

- Send Interview Sheet back by E-mail or Wait for ZOOM Invitation.
- Prepares for ZOOM Session by reviewing **What to Bring** List for appropriate documents needed.

04



STEP 4: Confirm Appointment and Install Zoom

- Call back to confirm Readiness for ZOOM Invitation (Doc and Completion of Taxpayer Intake Sheet)
- Install Zoom Application on phone or computer, and test connection.

05



STEP 5: Attend Zoom Session

VITA Coordinator will Invite you to UHD VITA Face-to-Face ZOOM Session and assign a Tax Return Preparer

- You and the Preparer will be Assigned to a Separate Breakout Room VITA ZOOM (Session Screenshared Tax Return Preparation System utilized as Appropriate)

MARCH 9- APRIL 15

VIRTUAL CLINIC HOURS

| DAYS | TIME |
|--------------------|-----------------------|
| Monday & Wednesday | 4:00 P.M. - 6:00 P.M. |
| Tuesday & Thursday | 9:30 A.M. - 5:30 P.M. |
| Friday | 9:00 A.M. - 3:00 P.M. |
| Saturday | 9:30 A.M. - 1:30 P.M. |

WHAT TO BRING

- W-2, 1099-MISC, etc.
- Student, Fee Bills
- 1099-DIV, 1099-INT Interest & dividend
- Total paid for daycare, provider's EIN
- Social Security cards
- ITIN assignment letter
- Donation documentation
- Property taxes paid
- 1095, Health Insurance Statements
- Health Insurance Exemption Certificate
- Income transcripts from IRS, if applicable
- Bank routing and account numbers
- Both spouses' for MFJ
- IRS Form 13614-C

NON-RESIDENT ALIENS

- Passport
- Form I-94, Arrival and Departure Record
- Photo ID
- Foreign status proof
- Birth dates for all family members
- W-2, W-2G, 1099-R, 1099-Misc
- 1042-S
- IRS Form 13614-NR

CONTACT

Email: uhdvita@uhd.edu

VITA Clinic Phone: 713-222-5328

Website: bit.ly/2Rm8pja

