WHAT TO BRING

UH STAFF COUNCIL Tax Preparation Day

UH Staff Council will host four days of free tax preparation service by representatives from AARP Foundation Tax-Aide. UH students, staff and faculty can have their 2019 taxes prepared by an IRS-certified volunteer.

Week 1: Monday, February 24, 2020 and Wednesday, February 26, 2020
Week 2: Monday, March 2, 2020 and Wednesday, March 4, 2020

Time: 10:00 am to 2:00 pm each day.

Location: 4513 Cullen Boulevard, Room 108, Houston, TX 77204

Please be advised in order to prepare your tax return you must have all necessary documents at the time of check-in. If you do not have all documents you will be asked to return on another date.

Documents

- Social Security card or ITIN document for each person on the return, including dependents
- Government issued photo ID for Taxpayer (and spouse, if applicable).
- Banking information (account number and routing number) for direct deposit of refund
- Last Year's income tax return(s) may help in filing this year's return. Not everyone will have filed a tax return last year.

Proof of Income

- W-2 from each employer
- Unemployment compensation statements
- SSA-1099 Form showing the total Social Security benefits paid to you for the year, or Form RRB-1099, Tier 1 Railroad Retirement benefits
- 1099 Forms reporting interest (1099-INT), dividends (1099-DIV), proceeds from sales (1099-B), as well as documentation showing the original purchase price of your sold assets
- 1099-R Form if you received a pension, annuity, or IRA distribution
- 1099-MISC Forms
- Information about other forms of Income
- State or local income tax refunds

Payments

All forms and canceled checks indicating federal and state income tax paid (including quarterly estimated tax payments)

Health Insurance

- 1095A Forms if you purchased insurance through the Marketplace (Exchange)
- 1095B/1095C Forms (if applicable)
- Any exemption correspondence from the Marketplace (if applicable)

Deductions

**Most taxpayers have a choice of taking either a standard deduction or itemizing their deductions. If you have a substantial amount of deductions, you may want to itemize. You will need to bring the following information:

- All forms and canceled checks indicating federal and state income tax paid (including quarterly estimated tax payments)
- 1098 Form showing any home mortgage interest
- A list of medical/dental expenses (including doctor/hospital bills and medical insurance premiums), a list of prescription medicines, costs of assisted living services, and bills for home improvements such as ramps and railings for people with disabilities
- Summary of contributions to charity
- Receipts or canceled checks for all quarterly or other paid tax
- Property Tax bills and proof of payment

Credits

- Dependent care provider information (name, employer ID, or Social Security number)
- 1098-T and 1098-E Forms (Tuition and Student Loan Interest)

For more information visit uh.edu/sc/tax-prep-day.

J1 or F1 Visa Applicants

If you are on a **J1 or F1 Visa,** please email Shatera Anderson at sjanders@uh.edu immediately. There are some tax returns that our group will not be able to complete and further questions will need to be asked to get the appropriate tax group on campus.

WHAT TO EXPECT

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1 CLIENT FACILITATOR–INTAKE

- Sign in with your government issued ID.
- You will be screened to determine if you have all the necessary documents to file your return.
- If you have all your documents, you will be given the appropriate forms to complete.

2 WAITING AREA–FILL OUT FORMS

- Fill out the appropriate forms to complete your income tax return.
- People in the waiting area are at different stages of completing their income tax return.
- Bring writing utensils and a book for entertainment.

3 CLIENT FACILITATOR–COMPLETION FORM REVIEW

- Take your completed income tax return forms to the Client Facilitator.
- If your forms are complete, the Client Facilitator will put you in queue to see the **next available** Tax Counselor.

4 WAITING AREA–QUEUE

- You will wait in queue/line to see the **next available** Tax Counselor.
- Individual income tax returns are unique. Some returns are simple and fast while other returns may take a longer time to complete.

5 TAX COUNSELOR–QUALITY FORM REVIEW

- The Tax Counselor will review your return forms for accuracy with you.
- If your forms are correct, the Tax Counselor will begin the process to submit your income tax return to the IRS electronically through e-filing.

6 WAITING AREA–E-FILE

- You will wait for confirmation that the IRS received and accepted your income tax return.
- Wait time at this stage depends on the IRS's rate of processing electronic returns.

7 TAX COUNSELOR–RETURN STATUS/CONFIRMATION

- You will be notified the status of your return.
- If the IRS accepts your return, you will receive a confirmation notice.
- If your return is rejected by the IRS, the Tax Counselor will review your return with you once more.