



FREE

**TAX PREPARATION
Provided by:
SHSU ONLINE VITA**



BEARKAT VITA IS AVAILABLE ONLINE

SHSU’s Online Volunteer Income Assistance (VITA) program provides free assistance to people making \$57,000 or less in the preparation of their individual tax returns. IRS-certified volunteers provide free basic income tax preparation with electronic filing to qualified individuals.

**Online Center Hours
February 4th - April 15th
Thursdays 3:30 to 7:00 PM
[Appointment Required]**

STEPS TO THE ONLINE TAX PREP PROCESS

WHAT TO PROVIDE:

Step 1

If you make less than \$57,000, contact the VITA Center to obtain all required intake forms and to schedule a Zoom appointment with a certified volunteer. The intake forms will be emailed to you.

Email: vitacenter@shsu.edu Phone: 936-294-1263*

**Please leave a message because volunteers do not answer the phone daily.*

- Forms W-2, 1099, 1098, etc.
- Forms 1098-T and receipts for books/equipment purchased for educational purposes
- Social Security cards or ITIN letter
- Birthdates
- Documentation for donations, property taxes, and mortgage interest
- Form 1095 Health Insurance Statements
- Bank routing and account numbers
- Total paid for daycare and provider’s EIN

Step 2

Email completed intake forms and tax documents to the VITA Center. After review, the Center will send a Zoom invitation for an appointment with a volunteer. The invitation will include a password which you will need to access the session. Please see the **What to Provide** List for tax documents needed.

Email: vitacenter@shsu.edu

**ADDITIONAL DOCUMENTS FOR
NON-RESIDENT ALIENS
(INTERNATIONAL STUDENTS):**

Step 3

Accept the Zoom invitation and make sure to install the Zoom Application on your phone or computer **prior to** your scheduled appointment.

- Passport
- Form I-94, Arrival and Departure Record
- Photo ID
- Forms 1042-S

Step 4

Attend the virtual appointment via your password protected Zoom room. Once you enter the room’s lobby, the greeter will assign you a preparer. Your assigned preparer will schedule a time for your Zoom closing conference to review your return, which may be the same day.

Step 5

Attend Zoom closing conference (both spouses if filing a joint return). Review the return with the preparer and consent to electronic filing. A copy of your final return will be emailed to you, and your tax documents will be deleted/destroyed.

HOW TO CONTACT THE CENTER:

Email: vitacenter@shsu.edu

Phone: 936-294-1263

Website:

<https://www.shsu.edu/academics/business-administration/vita/>

