

## **\*\*FSA Free File VITA Instructions**

1. A Certified Tax Preparer will assist with software questions and tax preparation via
  - a. Phone: call 712-252-1861 x108
  - b. Email: [cfs@centerforsiouxland.org](mailto:cfs@centerforsiouxland.org)
  - c. Zoom: Call 712-252-1861 x108 and we will set up a Zoom meeting between you and a Certified Tax Preparer
2. 2 Options – Eligibility Requirements
  - a. OnLine Taxes
    - i. Any age
    - ii. Adjusted Gross Income (AGI) under \$73,000, or
    - iii. Eligible for EITC, or
    - iv. Active Duty Military and under \$73,000 AGI
    - v. Free state return if you qualify for a free federal return
  - b. Tax Act
    - i. Age 56 years old or younger AND Adjusted Gross Income (AGI) under \$65,000, OR
    - ii. Active Duty Military and under \$73,000 AGI,
    - iii. Free state return in the following states: *AR, AZ, GA, IA, ID, IN, KY, MA, MI, MN, MO, MS, MT, NC, ND, NH, NY, OR, RI, SC, VA, VT, WV.*
  - c. If you have previously filed your taxes using OnLine Taxes or Tax Act and already have an account, you will be able to use that account with the links below to file your taxes.
3. OnLine Taxes - Log-in to:  
<https://www.olt.com/main/vita/getstarted.asp?affiliate=VITAFREE&linkID=S26063046>
4. Tax Act – Log-in to:  
[https://www.taxact.com/ffa/vita?sc=21050399&promo=21CRVTAFEDFEDOL&utm\\_source=irs.gov&utm\\_medium=vita&ad=S26063046](https://www.taxact.com/ffa/vita?sc=21050399&promo=21CRVTAFEDFEDOL&utm_source=irs.gov&utm_medium=vita&ad=S26063046)
5. Create Your Own Personal Account
  - a. OnLine Taxes (You will need to enter our SIDN: S26063046) **OR**
  - b. TaxAct Account **OR**
  - c. Log-in with your existing account if you have used [olt.com](https://www.olt.com) OR [taxact.com](https://www.taxact.com) in the past.
6. Start new return
  - a. determine filing status
  - b. enter basic information, as needed, for taxpayer, spouse, dependents
7. Prepare Federal Return
  - a. enter income
  - b. enter adjustments
  - c. enter deductions
  - d. enter health insurance information, including 1095-A, if necessary
8. Prepare State Return(s)

(OVER)

- a. you may have multiple state returns if you worked in more than 1 state or lived in 1 state and worked in another, etc.
9. Finish Return – to finish your return you will have to:
  - a. select direct deposit/debit (if you owe) or paper check/mail payment for both federal and state returns
  - b. enter bank information for direct deposit/debit
  - c. enter your prior year's AGI (found on last year's tax return). Enter 0 if this is your first year filing or if you did not file last year.
  - d. enter your State ID information
10. Print or Save a copy of your tax return to your computer
11. Transmit to the IRS
12. Log-out of your OnLine Taxes or TaxAct Account