

DOCUMENTS NEEDED TO FILE YOUR TAXES

In order to file your taxes with the VITA Free Tax Prep Program, please gather the following documents. These documents are required to file your taxes. If you do not have them, use the links to get copies of the documents.

1. Original Social Security cards or ITINs for everyone on the return - NO exceptions.

The only other acceptable document is the SSA-1099. To get a replacement Social Security card, go to ssa.gov or call 1-800-772-1213. [Link to list of expired ITINs](#).

2. Photo Identification for each spouse on the return.

Both spouses must be present and sign, if filing jointly. Married Filing Jointly is the most advantageous filing status with a few exceptions. If choosing Married Filing Separately, you will need your spouse's Social Security number in order to electronically file. Without your spouse's social security number and birthdate, you will mail a paper copy of your return which will significantly delay any refund.

3. Letters from the IRS with the following information (where applicable)

If this information does not match IRS records, your return could be rejected or could go to the IRS Error Resolution Department which will greatly delay or alter your refund.

- Exact amount of the **third stimulus** payment that your household received. This includes taxpayer, spouse and dependents. You can use the [Get My Payment](#) application to check the status of your third payment only.
- Exact amount of total advance **child tax credit** payment your household received between July and December 2021. You can use this [payment tracker form](#) to calculate your total payments.
- Identity Protection PIN number. To retrieve a **I.P. PIN** or to get the I.P. PIN reissued, go to irs.gov.

4. All W-2s, 1099s, and income documents.

These can include: Business Income, [Social Security income](#), Retirement Income, [Unemployment Income](#), Interest from a savings account, 1099-B, Dividends, Cash Income and Gambling Income. To obtain a Wage Transcript from the IRS because of missing documents, go to irs.gov/transcript or call (800) 908-9946. Please make sure to request a non-redacted income and wage transcript.

3. Self-Employed and Contract Labor

If you are an on-demand driver (Lyft, Uber, etc.), you will need documentation from your service, as well as income expense records. RideShareTaxHelp.com has free comprehensive tax resources including a downloadable tax guide, step-by-step instructions, and calculators. Or you can use this [worksheet](#).

4. **Proof of Expenses**

These can include: charitable donation receipts, 1098-T education expenses, child care and dependent care expenses. For taxpayers wishing to itemize, please use this worksheet. Taxpayers do not need to itemize in order to claim up to \$300 (single) or \$600 (married filing joint) charitable cash contributions.

5. **Form 1095-A**

Only if you have health insurance through the Marketplace. To obtain your 1095-A, go to healthcare.gov or call (844) 644-5543.

6. **Direct Deposit Information**

For the refund to be deposited directly to your bank (the safest and fastest way), you will need the routing number and account number. This can be found on a check.

7. **Previous Year's Return**

Last year's returns are not required but is helpful to have with you. If you are filing yourself for the first time using a new software, federal law requires you to submit your AGI (Adjusted Gross Income). This can be found on your previous year's return. If you do not have a copy, you can obtain a transcript at irs.gov/transcript. Request a tax return transcript.

Out of Scope Overview

The following Income amounts or types are Out of Scope

- Total Income over \$76,000
- Rental Income (Schedule E)
- Farm Income (Schedule F)
- Ministers or Other members of clergy who present issues such as parsonage/housing allowance

Self-employment/Business Income (Schedule C) is limited; the following are Out of Scope

- Net loss on the business
- Total expenses over \$35,000
- Inventory – i.e. cost of goods sold
- Vehicle expenses other than standard mileage (can only use standard mileage rate method)
- Business use of home
- Depreciation of assets
- Employee expenses or contract labor
- Hobby or not for profit

Cancellation of Debt other than Credit Card Deb – Out of Scope

Sale of a home used for business purposes or rental property – Out of Scope

Adoption Expenses – Out of Scope