



What to bring to my VITA appointment?

****Click on the [Intake / Interview Quality Review Sheets](#) – from our website (uwayscc.org). Print, complete and bring with you along with any of the items below that are unique to you:**

1. Government issued Photo-ID for Taxpayer (and Spouse, if applicable)
2. Proof of SSN or ITIN for everyone included on the return. (SS cards are best)
3. W-2s for all jobs worked in 2020
4. 1099 NEC for Non-Employee Workers (Replaces 1099 Misc for contract workers)
5. 1099-DIV
6. 1099-INT
7. 1099-G (This is Unemployment Compensation)-NYS does not mail these out. Taxpayers must access this on the tax.ny.gov website. Please do that before arriving at the appointment.
8. Receipts for cash donations.
9. 1099-R and RRB-1099
10. Form SSA-1099
11. Proof of other income: Gambling; Royalties; Schedule K-1
12. College/Post-Secondary expenses (Form 1098-T)
13. Student Loan Interest Statement (Form 1098-E)
14. Child or dependent care expenses
15. Expenses for eligible educator
16. Expenses related to self-employment income (Nothing that depreciates)
17. 5498-SA/1099-SA (Health Savings Account)
18. 1095-A (Healthcare Coverage through Marketplace)
19. Stimulus Payment Information (How much was received for 1st and 2nd payments)
20. Direct Deposit Information (Bank Routing and Account Numbers)-if applicable
21. For those who want to claim IT-214 (Renter's Credit): SSI payments in 2020; Cash Public assistance and relief; All other household income; Rental costs (rent and any utilities paid by renter)

