COMMUNITY ACTION
WE FIGHT POVERTY

2019 COMMUNITY ACTION TAX AIDE PREPARATION
INFORMATION TO KNOW BEFORE YOUR APPOINTMENT

Thank you for scheduling your 2019 Tax Aide appointment with Community Action! We look forward to seeing you on your scheduled date and time. The information provided below with help ensure that we will be able to help you file your taxes.

GENERAL INFORMATION

- **DATES AND TIMES:** Community Action's tax preparation dates are every Wednesday and Thursday between January 30 and April 11. Appointments are scheduled between 9:00 a.m. to 2:00 p.m. If you need a different date or time, please visit the *AARP Tax Aide Locator* website to find other locations (https://secure.aarp.org/applications/VMISLocator/searchTaxAideLocations.action).

- **LOCATION:** Tax preparation will be held at the CRC CARE Center, which is located at 455 SE Golf Park Blvd.

- **APPOINTMENTS PREFERRED:** Scheduling an appointment is highly preferred! You can do this by calling 785-235-9296. Walk-ins will also be accepted if capacity allows.

- C**ANCELLATIONS:** In case of inclement weather, please check Community Action's Facebook page (https://www.facebook.com/wefightpoverty). We will also contact you using the provided telephone number. We also ask that you call us at 785-235-9296 if you need to cancel your appointment.

- **1 RETURN/APPOINTMENT:** As each appointment is scheduled for 1-hour, this is only enough time for the completion of a single tax return. Please let us know if you are filing additional returns for previous years (2017 or earlier) or more than one person in the household needs to file a separate return so we can schedule you appropriately.

- **AMENDMENTS:** January 30 to February 28 appointments are reserved for households filing a new 2018 tax return only. Amended return appointments will begin March 6.

- **CURRENT ITINs:** If anyone in your household is planning to file using an ITIN, obtaining an initial ITIN and/or renewing an expired one must be completed prior to filing your 2018 tax return. Please note that the IRS can take up to 60 days to process the ITIN application. If you need assistance with this process, please let us know.

- **REQUIRED DOCUMENTS:** You must bring several required documents to the appointment. If anything is missing, your appointment will most likely be rescheduled. Please pay close attention to the items listed below to ensure this does not happen.
  - Previous year's tax return(s).
  - Social Security cards and/or ITIN notices/cards or other official documentation that show the taxpayer identification numbers for every individual on your return.
  - Photo ID for each taxpayer.
  - Checkbook if you want to direct deposit any refund(s) or direct debit any amounts due.
  - Identity Protection PIN (IP PIN) (for each individual if applicable).

- **ADDITIONAL ITEMS:** The items below may be required if applicable to your household's tax situation. If any applicable items are needed but not brought, then you will most likely have to reschedule your appointment.

Income-Related Items

- W-2 from each employer.
- 1099-G form for unemployment compensation or state/local income tax refunds.
- SSA-1099 form showing the total Social Security benefits paid to you for the year, or RRB-1099, Tier 1 Railroad Retirement benefits form.
- 1099 forms (or other statements) reporting interest (1099-INT), dividends (1099-DIV) and/or proceeds from sales (1099-B), plus documentation showing the original purchase prices if you sold stocks or other assets.
- 1099-R form if you received a pension, annuity, or IRA distribution.
- 1099-MISC, 1099-K, or other 1099 forms.
- If you have a business, bring a summary list of all your income (cash and noncash) and all business-related expenses.
- Information about any other income* of any form including cash or other than cash.

*Generally, only taxable income-related documents are needed. However, if you will be filing a Kansas Homestead return along with the federal return, then documentation of ALL income received is needed for ALL household members residing at the address in which the tax return is being filed under. This included non-taxable sources such as SSI and military-related disability. As these are generally not automatically sent to the household, you will need to request it from the source.

Payment-Related Items

- Records of any federal and/or state and/or local income tax paid (including quarterly estimated tax payments) if not shown on income documents.

Deduction-Related Items

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. If so, please refer to the below list.

- 1098 form showing home mortgage interest.
- A summary list of medical/dental/vision expenses including doctor and hospital bills and medical insurance premiums, prescription medicines, assisted living services, long-term insurance and bills for medical related home improvements such as ramps and railings for people with disabilities.
- Summary of cash and noncash contributions to charity.
- Property tax bills paid during the year (frequently shown on mortgage statement).
- Records of unreimbursed business expenses related to your job or expenses related to your investments.

Health Insurance-Related Items

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

Credit-Related Items

- Dependent care provider information – name, address, telephone number and employer ID or Social Security number and amount paid to provider.
- 1098-T form for education expenses plus statement of account from the educational institution showing tuition and fees paid and scholarships, grants, etc. received. Also bring a summary of any other education expenses.
- 1098-E form for student loan interest.