

# DOCUMENTATION NEEDED TO FILE YOUR TAXES

A variety of documents are needed to file your taxes and ensure you receive the best refund possible. When filing in person, come with these items to help your appointment go smoothly.

## Intake Form

- ☐ If you have scheduled an in-person appointment, plan to **arrive 15 minutes early** to complete an Intake Form onsite, or print, complete, and bring [Form 13614-c \(2025\)](#) with you to your appointment.

## General Checklist (Please open all mail before your appointment.)

Whether you are filing your taxes in-person or online, these documents will be important to the process. *Scroll down for a list of required documents for special filings and situations, such as Kansas Homestead Refunds and self-employment.*

**NOTE:** Married-filing-joint tax returns require both spouses to be present to sign the required forms.

- ☐ **Photo ID.** Bring originals for you and your spouse, if filing jointly. Qualifying IDs include: valid U.S. driver's license, employer ID, school ID, U.S. state ID, military ID, national ID, Visa, and passport.
- ☐ **Proof of Identity**
  - Social Security cards for you, your spouse and all dependents (or social security statement or W-2, showing the SSN)
  - An Individual Taxpayer Identification Number (ITIN) notice for you, your spouse and your dependents if you do not have a Social Security number (SSN)
- ☐ **Birth dates** for you, your spouse and any dependents listed on the tax return
- ☐ **Income Information** - all W-2 or 1099 forms, including the following.
  - Social Security Benefit Statements (SSA-1099)
  - Interest and dividend statements from banks (Forms 1099-INT or 1099-DIV)
  - *Tip: If you cannot obtain W-2s or 1099s, log into your IRS [Account](#) to download for the current tax year and past years. You can also create an account and any income information with your social security number will be there.*
- ☐ **Bank Information for Direct Deposit (Paper checks will NOT be sent by the IRS in 2026!)**
  - Proof of bank account routing and account numbers, such as a blank check. *If you don't have a bank account and want your refund faster, United Way's [Bank On ICT](#) program can help!*
- ☐ **Last year's tax return**, if available.

## Special Filings & Required Documents

### Kansas Homestead Refund Only Returns

- |                                   |   |
|-----------------------------------|---|
| <input type="checkbox"/> ID       | <input type="checkbox"/> Property tax statement, if available or we can look up |
| <input type="checkbox"/> SSN Card | <input type="checkbox"/> SSI/SSD statement if you have                          |

**CONTINUED >**

**If you have any of the following situations, bring documentation:**

- ☐ **Marketplace Insurance (aka Affordable Care Act or Obamacare):** If anyone on the tax return was enrolled at any time during the year in, you must bring Form 1095-A, Health Insurance Marketplace Statement. Call 800-318-2596 to get the info over the phone or they can mail it to you. If you do not know if you have it, call and ask.
  - *Tip: If you did not get Form 1095-A in the mail, or you cannot find it, check your [Marketplace account](#)*
- ☐ **IRS Pin:** If you are required to use, a new one is issued every year. *We will be unable to file your return, or it will be rejected, without the IRS PIN, if you have one.*
  - Bring in the letter with the PIN (notice CP01A).
  - You cannot use a prior year's PIN
  - If you do not have your PIN, log into or create an IRS Account (ID.me) to obtain your PIN immediately or call 800-908-4490 (Note: with this option, your PIN is mailed and may take 3-4 weeks to arrive).
- ☐ **Overtime and Tips:** Bring any documentation sent to you by your employer. Also, bring your final paystub of the year. It can be electronic on your phone but make sure you can access it.
- ☐ **If you purchased a new vehicle in 2025:** Bring VIN number, interest statement showing amount paid in 2025, and purchase agreement showing the date of purchase, make and model of vehicle. Cannot be used for work, only personal use.
- ☐ **Educator Expenses**
- ☐ **Student Loan Interest paid**
- ☐ **Contributions to traditional IRAs**
- ☐ **Health Savings Account (HSA) Contributions** if you have a high-deductible health plan
- ☐ **Daycare Expenses**
  - Total amount paid to the daycare provider
  - Daycare provider's tax identification number (SSN or business EIN)
- ☐ **Educational expenses:** Bring Form 1098-T, provided by your educational institution.
  - *Tip: If you did not receive it, check your school account under finances or financial aid.*
- ☐ **Self-employed:** Bring income and expense **totals (We cannot add up expenses for you.)**  
*Note: We cannot prepare returns with business use of home, net losses, expenses for employees or contract labor, inventory, or depreciation.*
- ☐ **Itemized deductions:** Bring the following. *Even if you claim the standard deduction on your federal taxes, itemized deductions can reduce state taxes.*
  - Medical and Dental Expenses
  - State and Local Taxes
  - Home Mortgage Interest
  - Charitable Contributions

## Returns We Cannot Prepare

- Rental property income or expenses
- Farm income and farm rental income
- Foreign earned income or foreign tax credit
- Minister tax returns with parsonage/housing allowance
- Taxpayers with dual citizenship
- Taxpayers who have sold Bitcoins or other virtual currencies

*Updated: 01.2026*