



VITA ELIGIBILITY & DOCUMENTATION OVERVIEW

VOLUNTEER INCOME TAX ASSISTANCE SERVICE SUMMARY

The VITA grant program, an IRS initiative, aids underserved communities by offering free tax preparation services. It supports low- to moderate-income individuals, persons with disabilities, the elderly, and limited English speakers in filing their taxes annually. **If your income was \$70k or below last year, you qualify!** Through Haven Neighborhood Services' VITA program, the LMI community can file accurate and timely tax returns at no cost, delivered in a culturally responsive and linguistically sensitive manner.

DOCUMENTS NEEDED

- For married filing joint, both spouses **MUST** be present
- Government issued photo identification for you and your spouse (if married) (can't be expired)
- Original Social Security Cards or Individual Taxpayer Identification Number (ITIN) / cards for **yourself, your spouse, and dependents.**
- Birth dates for you, spouse, and/or dependents
- A copy of last year's tax return (*optional*)
- All forms W-2 and 1099, Information for other income
- Health Insurance Statements: Forms 1095-A, B or C (ACA Statements)
- Information for all deductions (including charitable contributions)/credits
- Total paid to daycare provider and their tax ID number
- For direct deposit of refund, proof of account and bank's routing number
- For prior year returns, copies of income transcripts from IRS (and state, if applicable)
- Applies **only** if you're filing for **2021 Tax Year:**
 - Notice 1444-C, Your 2021 Economic Impact Payment (Stimulus, if applicable)
 - Letter 6419 (en-sp) - 2021 Advance Child Tax Credit Payments (if applicable)

ELIGIBLE FILINGS

- Wages, salaries, etc. (Form W-2)
- Interest Income (Form 1099-INT)
- Dividends Received (Form 1099-DIV)
- State Tax Refund (Form 1099-G)
- Unemployment Benefits (Form 1099-G)
- IRA Distributions (Form 1099-R)
- Pension Income (Forms 1099-R, RRB-1099-R, CSA-1099)
- Social Security Benefits (Form SSA-1099, RRB-1099)
- Simple Capital Gain/Loss (Form 1099-B) *limited*
- Sale of Home (Form 1099-S) *limited*
- Prior Year and Amended Returns
- Self-Employed Income (Form 1099-MISC, Form 1099-NEC, and Form 1099-K) *limited*
- Gambling Winnings (Form W-2G)
- Cancellation of Debt (Form 1099-C) *limited*
- Health Savings Account (Form 1099-SA) *limited*
- Itemized Deductions *limited*
- Education Credits (Form 1098-T)
- Children Tax Credit
- Earned Income Credit
- Premium Tax Credit (Form 1095-A)
- Form W-7 (application for Individual Taxpayer Identification Number (ITIN))

INELIGIBLE FILINGS

- Schedule C with net loss, depreciation, or business use of home
- Complex Schedule D, Capital Gains and Losses
- Form SS-5 (request for Social Security Number)
- Form 8606 (non-deductible IRA)
- Forms 8615, 8814 (children's unearned income)
- Form SS-8 (determination of worker status for purposes of federal employment taxes and income tax withholding)
- Parts 4 & 5 of Form 8962 (Allocation of Policy Amounts, Alternative Calculation for Year of Marriage)
- Returns with casualty/disaster losses