Welcome to the WOU Volunteer Income Tax Assistance (VITA) income tax preparation service!

APPOINTMENTS ARE PREFERRED, BUT LIMITED WALK-IN SERVICE MAY BE ARRANGED THROUGH OUR WAITWELL APP.

To make or change your appointment: Appointments may be made through the VITA Appointment line at 503-751-4132, or online through our WaitWell appointment system through one of the links below:

WOU Welcome Center site in Monmouth: https://420101.waitwell.us/

Falls City Thrive or Falls City Resource Center at: https://420102.waitwell.us/

Schedule and Locations:

Tuesdays, Thursdays and Saturdays: WOU Welcome Center, Room 135, 701 Monmouth Ave N in Monmouth (Parking passes for Lot O are available during your appointment, request one at check-in).

Community Outreach appointments are offered in Falls City and Grand Ronde on several dates throughout tax season. Please call our appointment line at 503-751-4132 for more information.

What to expect at your appointment:

1. Taxpayers will come to the Tax Preparation Site with all their paperwork completed (See list below) and the required identification and forms/documentation.
2. A Client Facilitator will conduct a review of your documents and verify your ID.
3. A certified tax preparer (Tax Counselor) will review all your forms and ask clarifying questions. Your return will be prepared while you are present.
4. A Reviewer will confirm the accuracy of your return. Once the review has been completed, the Tax Counselor will go over the return with you and answer all of your questions. You will receive a printed copy of the return and sign IRS Form 8879 authorizing us to e-File your return. Your return will be e-Filed within 48 hours.

Please Note: You will be required to verify your identity to each volunteer with whom you interact.

Things to bring (Please have all documents removed from envelopes):

- ☐ Intake/interview form (Form 13614-C) filled out, all pages
- ☐ Social Security cards for all individuals on tax return (Social security or other federal benefits statement is adequate)
- ☐ Picture ID for all adults on tax return
- ☐ SSA-1099 showing social security benefits received
- ☐ W2 - Wages/Salary from all employment
- ☐ 1099-INT, DIV from all bank accounts
- ☐ 1099-R for all retirement / pension income
- ☐ 1099-MISC, 1099-NEC, 1099-K from other income
- ☐ Brokerage statements (all pages) from ALL non-retirement accounts
- ☐ Medical Expense worksheet completed
- ☐ Itemized Deduction and credits worksheets completed
- ☐ Mortgage Interest Statement and Property Tax bill(s)
- ☐ Income and expenses from self-employment, Worksheet for Self-Employed completed
- ☐ Education expenses and funding sources for post-secondary education, 1098-T from 2023 & 2024, itemized statement of charges and payments from the College or University
- ☐ 2023 Tax return
- ☐ Check or bank information if you want direct deposit

Expenses and Tax Credit Worksheets
Tax Year 2024

MEDICAL EXPENSES WORKSHEET:

The Medical Expenses worksheet is divided into 4 columns: Total, Taxpayer, Spouse, and Dependents. This is to assist in calculating the Oregon Special Medical Subtraction for those over 66 years old. If all taxpayers are under 66 years old on December 31, 2024, totals for all taxpayers are fine.

DO NOT include medical insurance premiums that are paid pretax through your employer. If you are not sure, please make a note, and the tax preparer will discuss it with you.

ITEMIZED DEDUCTION AND CREDITS WORKSHEET:

The second worksheet is for all other possible deductions. The TaxSlayer software we use will automatically provide the most advantageous use of your deductions.

Remember that while the Federal standard deduction is high, the Oregon standard deduction is not. List your expenses even if you think you will use the standard deduction for Federal.

For Property taxes, make sure you list the property taxes that you actually paid in 2024, not the amount of the bill.

Cash and non-cash donations should be listed as they may be beneficial on the Oregon return. The Federal special deduction for charitable deductions has been eliminated for those that do not itemize. Non-cash donations over $500 may not be reported on a tax return prepared by a VITA preparer, per the VITA Program guidelines.

Statements required: The only required statements are for mortgage interest and property tax. All other expenses should be totaled and entered into the appropriate place on the form.

WORKSHEET FOR SELF-EMPLOYED USING A SCHEDULE C

The third worksheet is for self-employed business income and deductions, including mileage (deductible vehicle expense). Do not complete this worksheet unless you had your own “sole proprietor” business during all or part of 2024. Common examples of income earned that is considered to be self-employment income include DoorDash, Uber, Lyft and other similar sources of income where you are paid as a contractor or are paid directly by a customer for services that you provide.

Itemized Deduction and Credits Worksheet

Tax Year: ________________

Tax Payer's Name	Spouse's Name

Medical Paid Out of Pocket

	Total	Taxpayer	Spouse	Dependants
Medical mileage round trip total				
Medicare Premiums (for computing Special Medical Subtraction)	$	$	$	$

1. Medical insurance premiums (Not Medicare)	$	$	$	$
2. Doctor, dentists, copays	$	$	$	$
3. Prescription drugs	$	$	$	$
4. Laboratory services	$	$	$	$
5. Nursing help (not for healthy baby or housework)	$	$	$	$
6. Hospital bills	$	$	$	$
7. Prescription eyeglasses, hearing aides, crutches, etc.	$	$	$	$
8. Long Term Care Insurance Premiums	$	$	$	$
9. Other: Please describe	$	$	$	$
TOTAL:	$	$	$	$

Itemized Deduction and Credits Worksheet

Tax Year: ________________

NOTES:

Taxes you paid

1. Real estate taxes	$
2. Personal properety taxes	$
3. Other taxes (Please describe)	$
4	$

Interest you paid

1. Home Mortage interest (reported on Form 1098)	$
2. Home Mortage interest (reported on Form 1098)	$
3	$

Property donated to charities for which you have receipts

$

Cash gifts to charities for which you have receipts

$

Miscellaneous Deductions

1. Gambling losses to the extent of winnings	$
2. Other: Please describe	$

Credits

	Quarter 1 Date Paid / /	Quarter 2 Date Paid / /	Quarter 3 Date Paid / /	Quarter 4 Date Paid / /
1. Estimated Federal Tax Payments	$	$	$	$
2. Estimated State Tax Payments	$	$	$	$

3. Political contributions	$
4. Other: Please describe	$

Worksheet for Self-Employed using a Schedule C

If any of the following statements apply to you:
__I paid employees or other individuals
__I had more than $35,000 in business expenses
__I kept an inventory for my business
__I have assets to depreciate (any > $2,500)
__I want to deduct a home office
__I received a Form 1095-A
__I need to report a business loss
__I don't use the cash method of accounting
STOP. We cannot do your return. If you checked none of these above, please continue by completing the worksheet below for each business.

Income	
Forms 1099 (-NEC, -MISC, -K)	$
Cash, checks, etc. (incl. tips)	$
Business expenses	
Advertising	$
Commissions and fees	$
Health insurance premiums	$
Business insurance	$
Interest on business loans	$
Office expense/supplies	$
Rent (not home office)	$
Repairs	$
Supplies	$
Licenses or fees	
Business part of phone	$
Training for this business	$
Tools, etc. under $2,500 each	$
Travel away from home	$
Other (specify)	
	$
	$
	$

Business use of car or truck	
Fill out one option only. Most people use Option 1 as it is easier and you usually will claim a larger deduction with his method.	
Option 1: Standard Mileage	
Total mileage for year	
Business miles	
Commuting miles	
Other miles	
Vehicle description:	
Date placed in service:	
Option 2: Actual Car/Truck Expenses	
Car loan interest	$
Parking, tolls	$
Gas	
Insurance	
License Fees	
Repairs/Maintenance	
Roadside Assistance plans	$
Lease payments	$
Car Washing	$
Other (specify)	$