

Filing your taxes is complicated.

LET THE LIBRARY AND OUR VOLUNTEERS HELP!



Tax Documentation available at all Greene County Public Libraries

As a community service, all Greene County Public Libraries are distribution points for Ohio State Tax instructions and Federal Tax 1040 instructions and forms. State tax packets and other Federal forms may be requested and mailed to your home through tax.ohio.gov/wps/portal/gov/tax and IRS.gov respectively. **Your library can print forms for you for \$.15 a page.**

Volunteer Income Tax Assistance at the Xenia Community Library

The Volunteer Income Tax Assistance (VITA) staff will be offering **in-person tax appointments** at the Xenia Community Library (76 East Market Street)

from January 25 through April 15, 2022. Call 937-352-4000 (option 3) to schedule your in-person tax appointment with our VITA staff or visit our Information Desk to make a VITA appointment. *The tax return appointment is limited to no more than two people per return.*

PLEASE NOTE: If you would like to have the VITA staff assist you at the Xenia Community Library you **MUST BRING THE DOCUMENTATION LISTED BELOW TO YOUR APPOINTMENT.**

Please bring these documents to your VITA appointment:

- Social security cards for everyone in the family – **no exceptions.**
- Photo ID for the Taxpayer and Spouse. A current Ohio Driver's License is preferred but employer ID cards with a photo, military ID, state ID card, and passport are also acceptable.
- All of your W-2 forms from **all** of the jobs you worked from the beginning of 2021 through the end of the year.
- If you have children that were under age 18 in 2021 **and received** the advance child tax credit (approximately \$300 per month starting in July 2021), you **must** bring your IRS letter 6419 detailing your payments received. This letter will be mailed by 31 January 2022. **The VITA site cannot prepare your tax return without that letter.**
- If you have children under the age of 13 and paid for childcare expenses while you worked or looked for work, bring your childcare provider receipt. It **must** contain the SSN or EIN of the person or organization caring for your child(ren), the provider's name and address, and the amount you paid for such care itemized for each child. The Child and Dependent Care Credit is **fully refundable** for tax year 2021.
- Unemployment received in 2021 (1099-G). You can log into your online account and print your statement.
- Social Security statements (1099-SSA).
- All 1099-NEC (non-employee compensation) income forms if self-employed, and any other source of cash income.
- If self-employed, have your business expenses documented, totaled, and available at your appointment.
- If you have a health savings account (HSA), you must have your 1099-SA form if you took money out of the account last year.
- If you have insurance through the Marketplace (ACA/ Obamacare), you must bring your 1095-A form.
- Bring documentation related to your out-of-pocket health expenses. This includes your year-end pharmacy statement, co-pays for medical expenses, dental expenses, eye expenses, hearing aids, and medical health insurance (including dental and eye) and long term care (LTC) premiums.
- If you made **CASH** charitable donations in 2021, bring your donation contribution receipt letter(s). Even if you unable to itemize deductions, you may be able to reduce your income by your charitable contributions (such as church tithes) and increase your refund.
- If you have a brokerage account, you must wait for your 1099-B forms. *These forms often do not arrive before March so please **do not schedule your VITA appointment before March 15, 2022.***
- If a member of your household attended college/university and received a Form 1098-T with tuition and scholarship information, you must provide a school account statement for the year showing all college charges and payments.
- If you want your refund to be direct-deposited, bring your bank's routing number and account number. *Your debit card or payroll card does not have the information needed for direct-deposit so you may need to call your bank to get the required information in advance of your appointment.*
- Your 2020 tax return. If you did not file a tax return for 2020, bring **ALL** of your 2020 tax documents as noted above in order to file a 2020 tax return.
- Any letters received in 2021 from the IRS, the state of Ohio, or the School District received.

Appointments are available:

- Mondays from 10am to 4pm
- Tuesdays from 10am to 4pm
- Fridays from 10am to 4pm

