

# FAQs ON VITA TAXES FOR CLIENTS

## Do I qualify for VITA?

- Household Income less than \$69,000 in 2025
- Live in Benton, Cedar, Iowa, Jones, or Linn County  
→ If not, go to [www.myfreetaxes.com](http://www.myfreetaxes.com)
- No “out of scope” tax situations for VITA, including rental or farm income

## How do I make an appointment?

- Make an appointment online at [uweci.org/VITAclient](http://uweci.org/VITAclient). VITA does not accept walk-ins.
- In person appointments are an hour
- Intake appointments are 30 minutes and include reviewing info about your taxes and coming back in two weeks to pick them up. Taxes are not filed until clients sign at pickup.
- Reserve one appointment per tax year being filed, back to back if possible
- VITA prepares 2022–2025 only
- Taxpayers must be present for their appointment
- Bring all documents and IDs to each visit

## What do I need to bring to my appointment?

*To e-file jointly, both spouses must be present to sign forms.*

- Government photo ID for all taxpayers
- Social Security Cards for everyone on the return
- Bank account and routing number (for direct deposit/withdrawal) Proof of bank account – routing and account numbers for direct deposit, such as a blank check
- Last year’s tax return or IRS transcript (helpful)
- All 2025 tax documents, which might include the following:

- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-NEC) from all employers
- Interest and dividend statements from banks (Forms 1099)
- 1099-G for unemployment or state tax refunds
- Total paid for daycare provider and the daycare provider's tax identifying number, such as their Social Security Number or business Employer Identification Number
- Form 1095-A, Affordable Health Care Statements, if anyone used ACA/Marketplace health insurance in 2025
- 1098-T and statement of expenses, if attending college
- Any Other IRS or state tax documents you received

### **What if I'm missing one of these documents?**

- Government photo ID for all taxpayers
  - VITA can accept a valid driver's license, state-issued photo ID, school photo ID, or passport
  - If you don't have photo ID, it can be obtained from the Iowa DOT  
<https://iowadot.gov/drivers-licenses-ids/new-iowa>
- Social Security Cards for everyone on the return
  - Please bring your physical social security card. VITA cannot assist if you only bring your social security number and not the physical card. If you need to replace your social security card, you can do so at  
<https://www.ssa.gov/number-card/replace-card> or call 1-800-772-1213.
  - The only acceptable substitute for a social security card is the form SSA-1099 issued by the Social Security Administration
- Bank account and routing number (for direct deposit/withdrawal)

- A bank account for direct deposit/withdrawal will be required for most taxpayers this year.
  - See separate resource sheet for how to get a no or low fee bank account.
- All 2025 tax documents
  - If you're missing a W-2 or other wage statement, ask your employer
  - The 1095-A is available from the Marketplace. If you did not receive it or need to make a correction, call the Marketplace Call Center at 1-800-318-2596 (TTY: 1-855-889-4325)
- Last year's taxes: request a tax transcript from the IRS
  - By mail (takes 5-10 calendar days)
    - Complete this form: <https://sa.www4.irs.gov/oat/>
    - Call 800-908-9946
    - Mail a print copy of the 4506-T to the IRS: <https://www.irs.gov/pub/irs-pdf/f4506t.pdf>
  - Online
    - Create an id.me account with the IRS  
[https://sa.www4.irs.gov/ola/tax\\_records/transcripts](https://sa.www4.irs.gov/ola/tax_records/transcripts)

### **How do I find what school district I live in for tax purposes?**

- Go to <https://educate.iowa.gov/pk-12/district-maps>
- Scroll down and click on the “shapefile” for the current school year.
- Enter your address in the search box on the right-hand side of the screen.
- Hover your mouse over the address on the map to see your school district name.

For further questions, please contact the VITA program at 319-398-5372 to be connected with a tax volunteer.