Dear Taxpayer:

Welcome to the Volunteer Income Tax Assistance (VITA) program at WOU for tax year 2023.

We will be preparing returns in person across the table from the taxpayer. If you are uncomfortable with this process, please let us know and we can refer you to another site that handles virtual appointments.

1. Taxpayers will come to the Tax Site with all their paperwork completed (See list below) and the required identification and forms/notices.
2. The client facilitator will conduct a review of your documents and verify your ID.
3. You will then sit with a certified tax preparer who will review all your forms and ask clarifying questions. Your return will be prepared while you are present.
4. You will then move to a reviewer, who is also a certified tax preparer. The reviewer will confirm the accuracy of your return and review the results with you. Once you have all your questions answered, your 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 member of our staff with whom you interact.

Things to bring (all taxpayers bring highlighted items, some of these tax documents may not apply to all taxpayers):

- ☐ 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
- ☐ Self-Employed worksheet (Schedule C), including supporting documentation if deducting mileage
- ☐ Itemized Deduction and credits worksheets completed
- ☐ Mortgage Interest Statement and Property Tax bill
- ☐ Any correspondence you may have received from the IRS or Oregon Department of Revenue
- ☐ Education expenses and funding sources for post-secondary education, 1098-T from 2022 & 2023, itemized statement of charges and payments from the College or University
- ☐ 2022 Tax return
- ☐ Check or bank information if you want direct deposit

Tax Preparation location: Western Oregon University, West House, 1st floor.
West House is located at the corner of Monmouth Ave. N and Jackson St. E in Monmouth.
To make or change your appointment, please call 503-751-4132 and leave a message.
One of our staff members will call you back.

REMEMBER: You are responsible for the accuracy of the information entered on your tax return.
Review previous returns to make sure you have all your information for 2023.

Expenses and Tax Credit Worksheets
Tax Year 2023

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, 2023, 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 2023, 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. Non-cash donations over $500 need to be itemized and include original cost, purchase/acquisition date, FMV at time of donation. Total non-cash donations cannot exceed $5,000 and cannot include cars, boats, etc. over $500.

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.

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 propercty 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	$