



Tax Compliance Day Checklist

For all attendees

- Original photo identification such as driver's license, school, employer, military, or state ID for you and your spouse (if married)¹
- Social Security cards or Individual Taxpayer Identification Number documents for you, your spouse, and dependents
- Birth dates for you, spouse, and dependents
- All Forms W-2 and 1099
- Information for other income
- Information for all deductions and credits
- The last tax return you filed, if possible

If you have a balance due

You can expedite your appointment by completing the Division's [Form RI-9465](#) prior to your visit. This form is necessary to enter into a payment plan with the Division, which many taxpayers find helpful.

If you are missing prior-year filings

Please also bring the following:

- All W-2, 1099 and 1095-A forms, or all federal and state transcripts* for tax years that need to be filed (2019-2023)The last tax return you filed, if possible
- Child and Dependent Care Expenses, including the total paid to daycare provider and their tax ID number
- For direct deposit of refund, proof of account and bank's routing number. This can be a check or a savings account number with routing number
- HealthSource RI paperwork or proof for all health insurance coverage/Form 1095-A, if applicable

For the fastest service, please bring your IRS records and transcripts.*

You can access them online by:

- Visiting the IRS's website: <https://www.irs.gov/individuals/get-transcript>
- Logging in to your [Individual Online Account](#)
- Print your transcripts

Y	N	N/A	Item
			Photo ID(s)
			Social Security card(s)
			W-2s (or similar)
			Self-employed income and expense records
			Last return filed
			Form RI-9465
			Child/dependent care information
			Form 1095-A (or similar)
			IRS transcripts

¹ For married filing jointly, both spouses must be present.

* For fastest service, bringing transcripts is suggested, but not required. Taxpayers unable to access their online accounts will be provided their transcripts at the event, if needed.