# **Military OneSource Tax Services**

## Frequently Asked Questions

### Q: What services does Military OneSource tax service provide?

A: Military OneSource provides access to an online tax filing service at no cost to you. The service allows you to complete and electronically file your federal and up to three state tax returns or filings. Your calculations are guaranteed to be 100 percent accurate or the online tax service provider will pay the penalties and interest.

### Q: Who is eligible for Military OneSource Tax?

A: The following individuals are eligible for the Military OneSource tax services:

* All active-duty service members
* National Guard and members of the reserve (regardless of activation status)
* Members of the Coast Guard Reserve activated as part of the Department of the Navy under Title 10 authority
* Spouses and dependent children who are authorized in Defense Enrollment and Eligibility Reporting System
* A family member who is taking care of the affairs of an eligible service member when the service member is deployed
* A severely injured service member of one of the services noted above, or a designated family member of a severely injured member who is incapable of handling his or her own affairs, medically retired individuals are eligible until 180 days past their End of Tour of Service, retirement date or discharge date

### Q: Does Military OneSource tax service provide assistance before and after tax season?

A: Yes. Military OneSource provides year round access to tax counselors who can help you and your family find answers to your tax questions and maximize your refund.

### Q: How can a Military OneSource tax counselor help me?

**A:** Military OneSource tax counselors can provide the following assistance:

* Share information about the unique tax requirements and issues related to military personnel and their families
* Identify applicable IRS and state tax regulations, definitions and forms
* Provide electronic copies of tax forms and help you understand how to complete them
* Review options for using a refund, including options for using it to pay down debt
* Explain additional tax services available to the military community such as Volunteer Income Tax Assistance clinics

### Q: What documents or information do I need to prepare my taxes?

A: You will need the following:

* Social Security card and date of birth for you, your spouse and dependents
* Child care, education and adoption costs
* W-2 forms from all employers for you and your spouse
* Form 1099 for independent contractors
* Investment income forms
* Alimony information
* Social Security benefits
* Miscellaneous income
* Form 1098-E for student loan interest
* Charitable donations
* Uninsured medical and dental expenses
* Real estate taxes
* Receipts for any deductible expenses

### Q: When and where can I locate my W-2 forms?

A: Your W-2 forms are typically available from your military service beginning in January. You can download your military W-2 from [myPay](https://mypay.dfas.mil/mypay.aspx). Tax forms are also available at your local post office and library. You can also download them from the [IRS](http://www.irs.gov/) website.

### Q: How can I learn more about Military OneSource tax services?

A: Call 800-342-9647 for additional information.