

TAX DOCUMENTATION – WHAT’S NEEDED?

Tax documentation has been requested to verify that your company is meeting the requirements for participation and eligibility. The actual documents you submit will depend on your business structure. Please be aware that we may need to request additional information. We encourage you to block out Social Security numbers and addresses before submitting documents. However, please do not block out dollar amounts. This information helps us verify that enrolled owners and/or officers are earning income from the group. We understand that the information you submit to us is very personal and confidential. We are committed to protecting the privacy and sensitive data of every one of our members.

Sole Proprietorship/Self Employed

- Form 1040 (the first 2 pages with a preparer’s or owner’s signature) including the corresponding Schedule C or F (W-2’s for any income reported on line 7 of the Form 1040)
- If the group has additional employees, the most recently filed Oregon State Employer’s Wage & Tax Quarterly Report (Form 132)

Partnership

- The most recently filed IRS form 1040 (the first 2 pages with a preparer’s or owner’s signature) for each enrolling partner including the corresponding Schedule C or F (W-2’s for any income reported on line 7 of the Form 1040)
- OR
- The most recently filed IRS form 1065 (4 pages with a preparer’s or owner’s signature) including the corresponding K-1’s for each enrolling partner
 - If the group has additional employees, the most recently filed Oregon State Employer’s Wage & Tax Quarterly Report (Form 132)

Corporation/Subchapter S Corporation

- The most recently filed IRS form 1120 or IRS form 1120S (the first 2 pages with a preparer’s or owner’s signature) for each enrolling partner including the corresponding K-1’s for each enrolling shareholder
- If the group has additional employees, the most recently filed Oregon State Employer’s Wage & Tax Quarterly Report (Form 132)

L.L.C. Member

- Form 1040 (the first 2 pages with a preparer’s or owner’s signature) and the corresponding Schedule C or F
- OR
- The most recently filed IRS form 1065 (4 pages with a preparer’s or owner’s signature) including the corresponding K-1’s for each enrolling partner
- OR
- The most recently filed IRS form 1120 (the first 2 pages with a preparer’s or owner’s signature) for each enrolling partner
- AND
- If the group has additional employees, the most recently filed Oregon State Employer’s Wage & Tax Quarterly Report (Form 132)

Non Profit Organizations

- IRS form 990
- If the group has additional employees, the most recently filed Oregon State Employer’s Wage & Tax Quarterly Report (Form 132)

Religious Organizations

- The most recently filed Oregon State Employer’s Wage & Tax Quarterly Report (Form 132)

Farmer

- Form 1040 (the first 2 pages with a preparer’s or owner’s signature) and the corresponding Schedule F
- If the group has additional employees, the most recently filed Oregon State Employer’s Wage & Tax Quarterly Report (Form 132)