

Service member tax file: pay, deployments, PCS moves and drills

Download what you can from myPay before you deploy or PCS. Mark the items that apply to a spouse with their name.

Client or engagement

Pay and allowances

- ☐ Form W-2 from DFAS, downloaded from myPay
Box 12 code Q shows nontaxable combat pay; code P, excluded moving payments
- ☐ December Leave and Earnings Statement
To check allowances and which state was withheld
- ☐ Civilian Forms W-2 for a reservist's or spouse's other jobs
One per employer and per state worked
- ☐ Form 1099-R for military retired pay or TSP distributions
From DFAS or the TSP; note any tax-exempt combat zone balance

Combat zone service

- ☐ Deployment orders with dates in and out of the combat zone
Supports the exclusion and the filing extension
- ☐ Hospital records tied to combat zone service, if any
Dates extend the deadlines too
- ☐ IRS notices received while deployed
Bring the envelope dates as well
- ☐ Power of attorney, Form 2848 or a general military POA
If a spouse or someone else files while you are away

PCS moves

- ☐ PCS orders for each move in the year
One Form 3903 per move
- ☐ Travel voucher or settlement from DFAS
Shows dislocation, lodging and other allowances paid
- ☐ Receipts for moving costs the government did not cover
Packing, storage, lodging and travel for the household
- ☐ Home sale closing statement, if you sold after a PCS
Plus Form 1099-S and the dates of extended duty away

Reserve and Guard duty

- ☐ Drill and annual training orders
Only trips more than 100 miles from home count
- ☐ Mileage, airfare and lodging receipts for each trip
Less anything the unit paid back
- ☐ Meal receipts or per diem records
Half of meal costs is deductible

Family, school and residency

- ☐ State of legal residence record from your finance office
And the spouse's residency election, if made
- ☐ Form 1098-T and tuition assistance statements
For courses taken in the year
- ☐ Child care provider name, address, tax ID and amounts
For Form 2441, including on-base centers
- ☐ Last year's federal and state returns
For carryovers and to check the state filed in