Travel nurse tax home file and assignment records

Build the tax home file once and update it every year. Add one row per assignment to the contract group.

Client or engagement

Tax home proof

- [ ] Lease or mortgage statement for your main home
  All months of the year, including months away
- [ ] Property tax bill or rent receipts
  Proof you kept paying while on assignment
- [ ] Utility bills at the main home
  Shows duplicate living costs
- [ ] Driver’s license, car registration and voter card
  All at the tax home address
- [ ] Calendar of days spent at home between assignments
  Travel dates, plus local shifts worked near home

Assignments and pay

- [ ] Form W-2 from each staffing agency
  Check the state wage boxes for every state worked
- [ ] Assignment contracts and every extension
  Start and end dates and the facility address
- [ ] Pay stubs or pay summary showing taxable rate and stipends
  Housing, meals and travel listed apart from hourly pay
- [ ] Overtime detail for FLSA premium hours
  W-2 contracts only; from 2026, box 12 code TT on each agency W-2
- [ ] Agency reimbursement records
  Amounts paid back under an accountable plan

1099 contracts

- [ ] Form 1099-NEC from each facility or agency
  Compare with your own invoices
- [ ] Lodging receipts at each assignment
  Lease or nightly bills, with dates
- [ ] Meal receipts or per diem log
  Dates and location for each day away
- [ ] Mileage log between your tax home and assignments
  Plus trips between work sites

- [ ] License, BLS, ACLS, PALS and CE receipts
  Each state license and renewal
- [ ] Form 1040-ES payment confirmations
  Federal and each state

State returns

- [ ] List of dates worked in each state
  Match it to the W-2 state boxes
- [ ] Last year’s federal and state returns
  For carryovers and resident credits
- [ ] Uniform and license receipts for states that allow them
  W-2 travelers only; not used federally