

Rideshare and delivery driver tax organizer

2026 tax year, Schedule C (Form 1040)

Prepared for the clients of (firm name)

Your name, and your spouse's if filing jointly

Fill in one organizer per driver. If you drove more than one car, copy the car and mileage groups for each one.

Answer yes or no, or write the figure. For each yes, upload the documents listed under it.

Split your business miles at June 30 and July 1, because the IRS rate changed on July 1, 2026.

Apps and the forms they sent

Based on: Forms 1099-K and 1099-NEC; IRS gig work guidance

Apps you drove or delivered for, and the months you were active on each

Did any app send you a Form 1099-K?

☐ Yes ☐ No

If yes, send: Every Form 1099-K received

Did any app send you a Form 1099-NEC for bonuses, incentives or referrals?

☐ Yes ☐ No

If yes, send: Every Form 1099-NEC received

Does each app show a yearly tax summary in your driver account?

☐ Yes ☐ No

If yes, send: The yearly tax summary from each app (gross fares, fees, tolls, online miles)

Did you receive cash tips or payments outside the apps?

☐ Yes ☐ No

If yes, send: Your own record of each amount

Tips received through the apps, from the tax summary

The car you drove

Based on: Schedule C, Part IV; Publication 463

Year, make and model of the car

Date you first used it to drive for an app

Do you lease the car rather than own it?

☐ Yes ☐ No

If yes, send: Lease agreement; Lease payment statements

Did you buy the car during the year?

☐ Yes ☐ No

If yes, send: Purchase contract with price and date; Loan statement showing interest paid

Did you claim this car on a prior return?

☐ Yes ☐ No

If yes, send: Last year's return with Schedule C and Form 4562

Mileage for 2026

Based on: IRS standard mileage rates; Publication 463

Odometer reading on January 1 and on December 31

Business miles from January 1 to June 30

Business miles from July 1 to December 31

Commuting and personal miles for the year

Did you keep a mileage log, in an app or on paper?

☐ Yes ☐ No

If yes, send: Mileage log export or copy for the full year

Tolls and parking you paid that the app did not reimburse

Actual car expenses (fill in only if it applies)

Based on: Publication 463, actual car expenses

Do you want your preparer to compare actual expenses with the mileage rate?

☐ Yes ☐ No

If yes, send: Fuel and charging receipts; Repair, tire and oil change invoices; Insurance and registration bills

Car washes and interior cleaning

Roadside assistance membership

Phone, supplies and other costs

Based on: Schedule C, Part II

Did you use your phone for driving?

☐ Yes ☐ No

If yes, send: Phone bills for the year; Your estimate of the share used for driving

Did you buy a dash cam, phone mount, chargers or signs?

☐ Yes ☐ No

If yes, send: Receipts for each item

Did you buy water, snacks or cleaning supplies for passengers?

☐ Yes ☐ No

If yes, send: Receipts or card statements with those charges marked

Did you pay for your own health insurance?

☐ Yes ☐ No

If yes, send: Premium statements for the year

Were you or your spouse eligible for an employer-subsidized health plan in any month?

☐ Yes ☐ No

If yes, send: The months of eligibility

Taxes already paid and other jobs

Based on: Form 1040-ES; Forms W-2

Did you make estimated tax payments for 2026?

☐ Yes ☐ No

If yes, send: Date and amount of each payment; Payment confirmations

Did you also work a W-2 job during the year?

☐ Yes ☐ No

If yes, send: Form W-2 from each employer

Are you a new client for this preparer?

☐ Yes ☐ No

If yes, send: Last year's federal and state returns

Anything else your preparer should know