

## Additional Questions for 2020 Tax Returns

### **Did you receive the FIRST Economic Impact Payment (EIP)?**

*EIP 1 was \$1200 each for an eligible primary taxpayer and spouse and \$500 for each eligible dependent under age 17.*

- No
- Yes - How much did you receive in total? \_\_\_\_\_

**Note!** The taxpayer can verify amounts received for any EIP by logging into their bank account online or by requesting an IRS account transcript for 2020. If the taxpayer claims the Recovery Rebate Credit but the IRS shows that the taxpayer received either EIP, the refund will be reduced by that amount.

### **Did you receive the SECOND Economic Impact Payment (EIP)?**

*EIP 2 was \$600 for each eligible taxpayer on the tax return (dependents must be under age 17).*

- No
- Yes - How much did you receive in total? \_\_\_\_\_

### **Did you earn more money in 2019 than in 2020?**

*If so, the taxpayer may be eligible to increase their Earned Income Credit and Additional Child Tax Credit for 2020. If the taxpayer (or spouse, if applicable) has an ITIN and has no dependents, skip this question.*

- No
- Yes and I did my 2019 taxes with Foundation Communities.  
Which site did you use for your 2019 tax return? \_\_\_\_\_
- Yes and I did my 2019 taxes elsewhere.  
Do you have access to a copy of your 2019 return?  Yes  No
- I did not file a 2019 tax return. (No further action is needed.)
- I am not interested in locating my prior year return. / I am not eligible. (No further action is needed.)
- Unsure - Continue to tax preparation. The tax preparer will investigate with the taxpayer.

### **Self-Employed Taxpayers ONLY:**

In 2020, were you unable to work (at your job site or from home) between April 1st and December 31st because you were:

- subject to a Federal, State, or local quarantine or isolation order related to COVID-19? or
  - advised by a health care provider to self-quarantine due to concerns related to COVID-19? or
  - experiencing symptoms of COVID-19 and seeking a medical diagnosis?
- No - Stop here
- Yes - Answer the next set of questions:
1. How many days were you unable to work between April 1st and December 31st because you were unable to work? \_\_\_\_\_
  2. Did you require care for yourself? If Yes, for how many days? \_\_\_\_\_
  3. Did you provide care to another person? If Yes, for how many days did you provide care? \_\_\_\_\_
  4. Did you provide care to your son or daughter because their school or place of care was closed?

If **Yes**, for how many days did you provide care? \_\_\_\_\_

**Self-Employed Taxpayers who also received a Form W-2 ONLY:**

In 2020, did you receive family leave wages from your employer?

- Yes** - Ask the taxpayer if they have any documentation in addition to their W-2.
- No** - Stop here
- Unsure** - Continue to tax preparation. The tax preparer will investigate with the taxpayer.