

## Additional Questions for 2021 Tax Returns

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

EIP3 was \$1400 each for an eligible primary taxpayer and spouse and all eligible dependents.

- 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 2021. If the taxpayer claims the Recovery Rebate Credit but the IRS shows that the taxpayer received the EIP, the refund will be reduced by that amount.

### **Did you receive any Advanced Child Tax Credit payments?**

These were \$250/mo. for dependents under 6 and \$300/mo. for dependents age 6-17 from July to December. The maximum received in advance is \$1800 (per dependent under age 6) or \$1500 (per dep. age 6-17).

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

### **Did you earn more money in \*2019\* than in 2021?**

If so, the taxpayer may be eligible to increase their Earned Income Credit and Additional Child Tax Credit for 2021. 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.

**Tip!** If FC prepared the client's 2020 tax return and used 2019 earned income to maximize EIC or CTC, we can locate the 2020 tax return and find the 2019 earned income in the Basic Info section of the return.

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

Taxpayers who were unable to work at their job site or from home during certain periods in 2021 may be eligible to claim sick and family leave tax credits. Taxpayers must have been:

- 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.

**For the period January 1st to March 31st, 2021, were you unable to work for any of the above reasons?**

- No - Stop here
- Yes - Answer the next set of questions:

1. How many days were you unable to work between January 1st and March 31st? \_\_\_\_\_
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? \_\_\_\_\_

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? \_\_\_\_\_
5. Did you claim the sick and family leave credit in 2020? *We may need information from the taxpayer's 2020 tax return to claim the credit in 2021.*
- No. I did not file a 2020 return.** *The credit can be claimed using just 2021 information.*
- No. I filed a 2020 return but did not claim the sick leave credit.** *The credit can be claimed using just 2021 information.*
- Unsure. I filed a 2020 return but am unsure if I claimed the sick leave credit.** *Continue to tax preparation. The tax preparer will investigate with the taxpayer.*
- Yes and I did my 2020 taxes with Foundation Communities.** *We can locate a copy of the return in TaxSlayer.*
- Yes and I did my 2020 taxes elsewhere.** Do you have access to a copy of your 2020 return?  **Yes**  **No** *We need a copy of the return to claim the credit for work missed in this period.*

**For the period April 1st to September 30th, 2021, were you unable to work for any of the above reasons?**

- No** - Stop here
- Yes** - Answer the next set of questions:
1. How many days were you unable to work between April 1st and September 30th? \_\_\_\_\_
  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? \_\_\_\_\_
  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? \_\_\_\_\_

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

In 2021, did you receive family leave wages from your employer?

- Yes** - ask the taxpayer to provide any documentation they have (other than the W-2).
- No** - Stop here
- Unsure** - Continue to tax preparation. The tax preparer will investigate with the taxpayer.

**For taxpayers claiming the Child and Dependent Care Credit ONLY:**

For tax year **\*2020\***, did you have childcare expenses that totaled more than \$3,000 per child? If so, you may be able to claim some of that amount on your 2021 tax return.

- Yes** - ask the taxpayer for their total childcare expenses in 2020 and a copy of their 2020 tax return. (If FC prepared their 2020 tax return, it is most likely in the Drop Off TaxSlayer site.)
- No** - Stop here
- Unsure** - Continue to tax preparation. The tax preparer will investigate with the taxpayer.