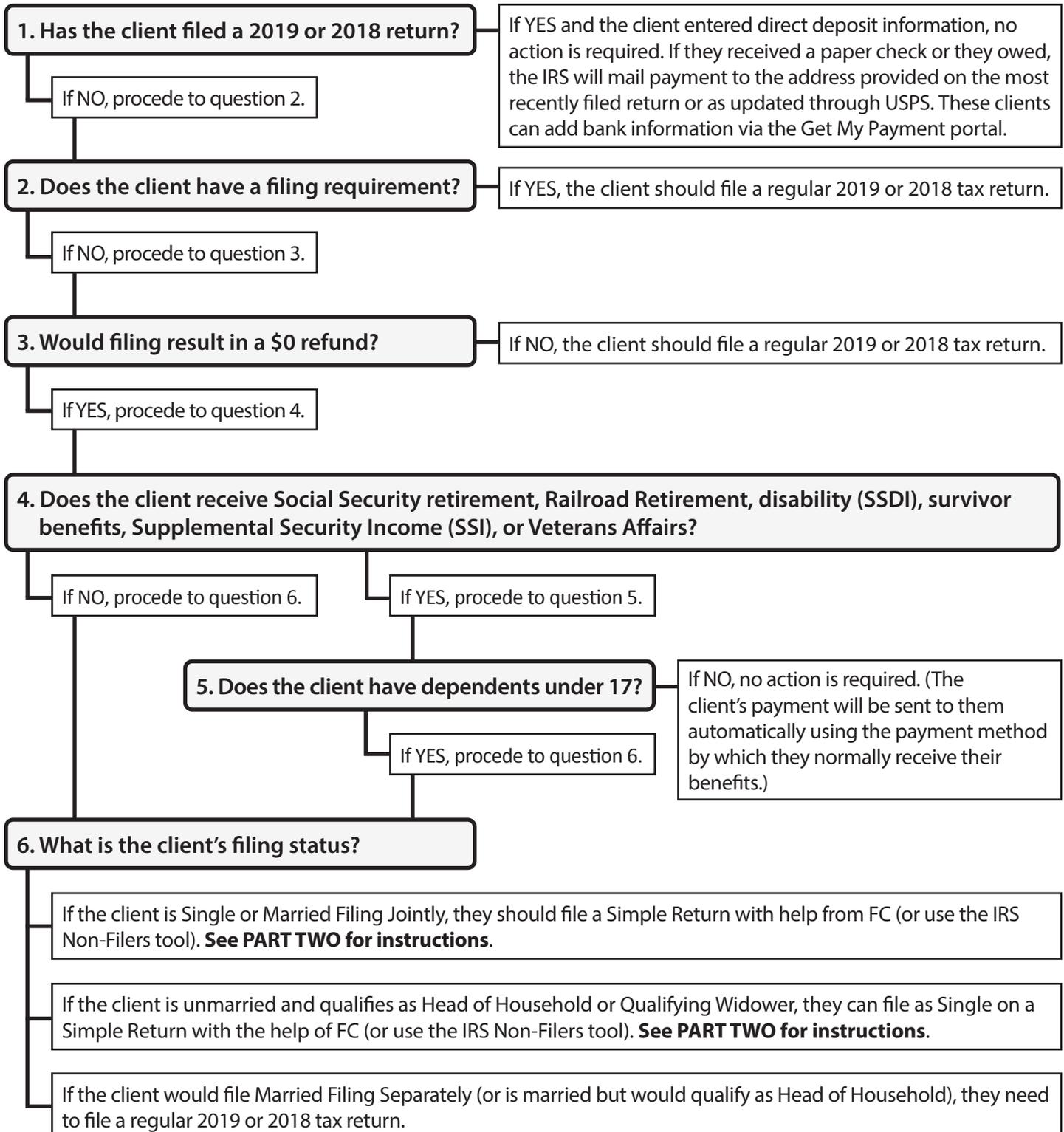


# HOW TO PREPARE A SIMPLE RETURN

## FOR THE PURPOSE OF RECEIVING ECONOMIC IMPACT PAYMENTS



### PART ONE: WHICH CLIENTS NEED TO PREPARE A SIMPLE RETURN?



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### PART TWO: HOW DO WE PREPARE A SIMPLE RETURN?

#### Refer to the following checklist when preparing simple returns in TaxSlayer:

- The Filing Status is Single or Married Filing Jointly.
- The Primary and Secondary taxpayers have an SSN (an ITIN is only allowed for spouse of a military member).
- Each dependent has an SSN or ATIN.
- The only income entered is \$1 on line 2b, taxable interest income. (Enter Unknown as the payer.)
- The question, "Did you purchase health Insurance via HealthCare.gov or a State Marketplace?" is answered "NO."
- The 1040 has "EIP2020" printed on the top lefthand corner. (See illustration below.)
- Bank information (routing and account numbers) is entered for the account where the client wants their stimulus check deposited.
- Only a federal return is completed (do not electronically file state returns with this method).
- The required demographic and consent questions in the E-file section are answered.
- The federal return type is set to E-file.

**EIP2020**

Form **1040** Department of the Treasury—Internal Revenue Service (99) **2019** U.S. Individual Income Tax Return OMB No. 1545-0

**Filing Status**  Single  Married filing jointly  Married filing separately (MFS)  Head of household  
Check only one box. If you checked the MFS box, enter the name of spouse. If you checked the HOH or QW box, enter t  
a child but not your dependent.

### PART THREE: HOW CAN CLIENTS CHECK OR UPDATE THEIR PAYMENT INFORMATION?

To enter direct deposit information or check the status of an Economic Impact Payment, clients should visit the Get My Payment portal, at [www.irs.gov/coronavirus/get-my-payment](http://www.irs.gov/coronavirus/get-my-payment)

The IRS plans to mail a letter about the economic impact payment to the taxpayer's last known address within 15 days after the payment is paid. The letter will provide information on how the payment was made and how to report any failure to receive the payment.