# General Interview Notes (unless specific problem states otherwise):

1. They did not itemize last year
2. Every person on the return had health insurance that met Minimum Essential Coverage rules for the entire year
3. TP/SP answer for Gubernatorial election campaign fund is the same as for the Presidential election campaign fund
4. They had no out-of-state purchases on which they did not pay Use tax
5. They want to handle any state refund / amount due like their federal refund / amount due
6. They had no interest in, signature authority over, or transactions involving foreign financial accounts; Any refunds or debits do not involve a foreign bank account
7. EIC Questions:
   1. TP/SP was not a nonresident alien for any part of the year.
   2. TP/SP cannot be a qualifying child of another person for EIC purposes.
   3. No other person can claim any dependent for EIC.
   4. The SSN for all dependents allows them to work and is valid for EIC purposes.
   5. The TP/SP have never had their EIC reduced or disallowed.
8. Neither the taxpayer or spouse are veterans.
9. No Virtual Drop Off was used

**Supplemental Intake Sheet**

Taxpayer – White – Non-Hispanic

Spouse – White - Non-Hispanic

# Intake Sheet, Part II, Line 2, To be completed by a Certified Preparer (unless specific problem states otherwise):

1. Can this person be claimed by someone else as a dependent on their return? – No
2. Did this person provide more than 50% of their own support? – No
3. Did this person have less than $4,050 of income? – Yes
4. Did the taxpayer(s) provide more than 50% of support for this person? - Yes
5. Did the taxpayer(s) pay more than half of the cost of maintaining a home for this person? – Yes

# Links:

1. TaxSlayer Practice Lab: <https://vita.taxslayerpro.com/>