

Virtual Supplemental Intake Sheet

1. Did you receive an Economic Impact Payment in 2020 or 2021?

EIP 1 (~April 2020) \$ _____ EIP 2 (~January 2021) \$ _____ EIP 3 (~February 2021) \$ _____
\$1,200/adult \$500/child \$600/person \$1,400/person

2. Did you pay rent in 2021? \$ _____

3. Did your name or address change from the prior year? Yes or No _____

4. Did you have health insurance in 2021?

Employer, Mass Health, Medicare, Connector Care, or other? _____

Months Covered _____ If 8 or fewer, does an exemption apply? _____

5. Did you make any charitable contributions in 2021? \$ _____

6. Can you confirm your bank account information if you would like direct deposit?

Bank Name _____ Checking Acct # _____

Routing # _____

Bank Name _____ Savings Acct # _____

Would you like to save your refund?

Routing # _____

7. How much did you receive in Child Tax Credit advance payments? \$ _____

8. Did you pay for childcare so you could go to work or school?

Provider name _____ TIN or SSN _____

Name of child(ren) _____ Cost per child \$ _____

9. Senior Circuit Breaker Credit if 65 or older (born in 1957)

Multi-family? Yes or No ____ Assessed value of home \$ _____

Property tax \$ _____ Total water and sewer paid \$ _____

If renting, subsidized? ____ Landlord name and address _____

10. EITC Lookback 2019 earned income \$ _____

Form 8812 line 6A or Worksheet A, Line 1 or Worksheet B line 4b

11. Educator Expenses \$ _____

12. IP PIN _____

Notes?

13. Self-Employment Information

Description of business _____ Business code, if known _____

Did you have any self-employment income not reported on a 1099-NEC? _____

Business expenses:

Advertising	Fees	Legal services	Office expense	Equipment rental
Office rental	Repairs	Supplies	Taxes/licenses	Travel
Other (describe)	Other (describe)	Other (describe)	Other (describe)	Other (describe)

Car and truck expenses:

Description of vehicle _____ Date placed in service _____

Total number of business miles (non-commute) _____

Do you have another vehicle available for person use? _____

Was this vehicle available for personal use during off duty hours? _____

14. Education Credit Information

Has the American Opportunity credit been claimed for this student in 4 other tax years? _____

Was this student enrolled at least half time? _____

Did this student complete the first 4 years of post-secondary education before 2021? _____

Has this student been convicted of a felony? _____

Education expenses not listed on a 1098-T \$ _____

15. Early Distribution of Retirement

Was this distribution due to COVID-19? _____

Does another exemption apply, if so, which? (4012 H-4) _____

16. Married Filing Separately

Spouse name _____ SSN _____ DOB _____

Address _____ Phone _____

