# Additional Information to Bring to Your Intake Appointment

If you answered "yes" to any of the Pre-Intake questions when you made your appointment, you will need to bring additional information to your Intake appointment. This information may not appear on any of the common tax forms you receive, and you may need to contact others to get the information. Please see the descriptions below to ensure you have all the additional information needed.

### Yes, I plan to claim a dependent who did not live with me.

If the dependent is your child who lives with their other parent, ask the other parent to sign IRS Form 8332. You need to bring this form so that we can attach it to your tax return to show the IRS that you have the right to claim the child.

### Yes, I paid someone else to watch my dependent while I worked or went to school.

Request a statement from the care provider that contains all of the following:

1. The care provider's name (or business name, if they have a day care business)
2. Their address and phone number
3. Their tax ID number (Social Security Number or ITIN for an individual, EIN for a business)
4. The amount you paid them to care for your dependent during 2017. If you paid them to care for more than one dependent, ask them to list how much you paid for each dependent

### Yes, I need to file a return for a tax year OTHER THAN 2017.

If you need a 2014, 2015, or 2016 tax return prepared AND you have all the forms and information you need, bring them to your Intake appointment. If you do NOT have all your documents, we will ask you to sign a form giving permission for Community Action to access your IRS transcripts to retrieve this information. If Community Action needs to retrieve your IRS transcripts, the prior-year tax returns will take at least 3 weeks to prepare.

If the IRS has requested that you file a prior-year tax return, or if you need a tax return for a year earlier than 2014, please call Andrew Ritta at 402-875-9351.

### Yes, I itemized deductions on my 2016 tax return.

Bring a copy of your 2016 tax return to your Intake appointment.

### Yes, I plan to itemize my deductions on 2017 tax return.

Use the Itemized Deductions Sheet to help organize your records of expenses. Bring this sheet and your expense documentation (receipts for charitable donations, 1098 forms showing mortgage interest and real estate taxes, registration receipts/pink slips for vehicle tax, etc.).

### Yes, someone in my tax household was WITHOUT health insurance or Medicaid at some point during 2017, and my employer or my spouse's employer offered health insurance that could have covered this person.

We need to know how much it would have cost you to cover this person. Contact Human Resources or Benefits Administration at the employer and find out the employee share of the premium for the cheapest employer-sponsored insurance policy that would have covered every uninsured person in the household. For example, your employer offers the following health insurance options:

| Who is Covered | Employee Portion |
|---|---|
| Employee Only | $80.00 |
| Employee and Spouse | $250.00 |
| Employee and Dependents | $265.00 |
| Employee and Family | $348.00 |

If your spouse and child were without health insurance, the cheapest policy that would have covered every uninsured person in the household is the Employee and Family plan. If only your child was without health insurance, the cheapest policy that would have covered every uninsured person in the household is the Employee and Dependents plan.

If you or your spouse paid health insurance premiums "pre-tax" through employer payroll deductions, find your final paycheck stub for 2017 or contact Human Resources or Benefits Administration at your employer and find out how much you paid for health insurance through "pre-tax" payroll deductions.

#### I had self-employment income or income as an independent contractor.

Bring records of your gross receipts and expenses. Use the Self-Employment Sheet to help you organize these records. If you drove for this work, bring your mileage log.

#### I had self-employment income or income as an independent contractor, and I used a space in my home for this work.

Bring records of your gross receipts and expenses. Use the Self-Employment Sheet to help you organize these records. If you drove for this work, bring your mileage log.

Measure the space (in square feet) you used <u>regularly</u> and <u>exclusively</u> for the business and find out your home's total area (in square feet).

#### I provided child care in my home.

Bring records of your gross receipts and expenses. Use the Self-Employment Sheet to help you summarize these records. If you drove for this work, bring your mileage log.

Measure any space (in square feet) you used <u>exclusively</u> for child care and NOT AT ALL for your family.

Measure the spaces (in square feet) you used <u>sometimes</u> for child care and <u>sometimes</u> for your family.

Find out your home's total area (in square feet).

Record the number of hours you provided childcare in your home during the year. If you had regular hours you were open each week, you can count the number of hours you were open per week and multiply it by the number of weeks you were open.

Bring records showing the total amounts you paid for rent, mortgage interest, real estate taxes, homeowner's/renter's insurance, utilities, and repairs during 2017.

#### I, my spouse, or a dependent was a university/college/community college student in 2017.

The student should receive a Form 1098-T from the school. If they do not receive a Form 1098-T request it from the school or access it through the school's online student portal (e.g., MyRED for UNL or the HUB for SCC).

Use the school's online student portal or contact the Bursar's office to get a student account statement showing all charges and payments for academic periods in 2017. If you were charged for the first academic period of 2018 and paid those charges before the end of 2017, get the student account statement covering that period as well.

Find out how many times the student's school expenses have been used to claim American Opportunity or HOPE Scholarship Credits prior to 2017.

Find out if the student was enrolled in a program that leads to a degree, certificate, or other recognized educational credential.

Find out if the student was CONVICTED of felony possession or felony distribution of a controlled substance (drugs) before the end of 2017.

### Yes, I bought or sold a house in 2017.

If you bought a house, bring your closing documents.

If you sold a house, bring your closing documents from both the sale AND from your purchase. Bring records showing the costs of any improvements or major repairs to house systems (e.g., new roof, new water heater, new furnace, etc.), or any other adjustments to your basis in the house.

If you bought the house in 2008 and received the first-time homebuyer credit, bring your records showing how much credit you received and how much you have repaid with tax returns in prior years.

### Yes, I rented property I own to someone else.

Bring records of your rental incomes and expenses (e.g., taxes, insurance, repairs, etc.)

Bring your depreciation schedule if you have rented this property before. If you started renting this property in 2017, bring records showing your original purchase price and any improvements you have made to the property.

### Yes, I put money into an IRA or Roth IRA that was NOT an employer-sponsored retirement plan.

Bring records showing how much you contributed for 2017 and what type of account.

### Yes, I put money into a Health Savings Account.

Bring records showing the amount you contributed DIRECTLY to the account. Do NOT include amounts contributed through your employer (these are recorded on your W-2).

Make sure you know what parts of the year you and/or your family were covered by a high deductible health plan.

### Yes, I put money into a 529 plan for someone’s college education or disability care.

Bring records showing the amount you contributed to the 529 plan and which state’s plan was used to open the account.

### Yes, I received public assistance (like SNAP/WIC, ADC, Section 8, Title XX, etc.).

Find out how much you received and what types of assistance. You can get this information from you Access Nebraska online account or request it from DHHS. If you would like assistance making an Access Nebraska account or retrieving the information, call Community Action’s Navigator Program Specialist Serena Reeves at 402-875-9355.