Accounting Aid Society

Federal Intake Supplement (2022 Season)

1.		
2.	Would Client Like a Reloadable Debit Card?	☐ YES ☐ NO
3.	Did the client receive the 2021 EIP payment? ($1,400 (2,800 MFJ) + $1,400 per dependent)	☐ NO ☐ YES; Amount: _____

4.   **Advance Child Tax Credit Payments**

Eligible taxpayers may receive part of their estimated credit in 2021 before filing their 2021 tax return. For tax year 2021, families claiming the CTC will receive up to $3,000 per qualifying child between the ages of 6 and 17 at the end of 2021. They will receive $3,600 per qualifying child under age 6 at the end of 2021.

1.	Number of Dependents between over 6 years old, under 18.	_____ X $3,000 = _____
2.	Number of dependents under 6	_____ X $3,600 = _____
3.	Total of line 1 and 2	
4.	ACTC that **should have** been received in 2021 (line 3 divided by two)	_____ / 2 = _____ (amount in line 3)
5.	Amount of Advanced Child Tax Credit **actually** received in 2021	

If there is a difference between line 4 and line 5, then more information is needed. Most client's received the full amount of ACTC. If there is a discrepancy between the amount they should have received, and actually did receive, the IRS is likely to do a manual review of the return. This will delay the refund.

5.	Dependency Questions?	If the client lived with their parents, did the parent(s) claim them as a dependent (have client call parents and ask) ☐ NO ☐ YES If the client has a dependent who worked, did the dependent file and claim themselves. (have client call dependent and ask) ☐ NO ☐ YES If the client is a single parent, find out whether the child's other parent has claimed the child: ☐ NO ☐ YES
6.	EITC Lookback: Will the client elect to use their 2019 earned income to calculate the 2021 EITC? (Client MUST provide 2019 tax return)	☐ NO ☐ YES
7.	Retirement Distributions	1) Did the client take a distribution in 2020 for a COVID related reason? ☐ NO ☐ YES 2) If yes, did they elect to spread the taxable amount over 3 years? ☐ NO ☐ YES 3) Did they recontribute any of the amount? ☐ NO ☐ YES