

2023 Tax Return Intake for 2022 Tax year (to be completed before making an appointment)

Name: _____

Email: _____

Phone number: _____

Student ID number: _____

1. US residency status: (select one)

- US citizen or legal permanent resident (green card holder)
- International student
- Other Nonresident (DACA, NEIS, temporary work visa, etc.)

2. Did you file a 2021 tax return?

- yes (you must have a digital or paper copy of 2021 tax return available during filing session)
- no

3. Are you being claimed as a dependent on your parents' or someone else's tax return? (Hint: Did your parents or another person provide more than half of your support throughout the tax year?) *

- yes
- no (no one can claim me; I supported myself)
- unsure (you must confirm with parents or person who supported you before filing tax return)

4. What is your tax filing status?

- single (unmarried and no dependents)
- married filing separately (generally legally separated)
- married filing jointly (with spouse's authorization, they must be present or give verbal consent)
- head of household (have dependents)
- qualifying widow

5. Are you claiming any dependents? (children, parents, or other person for whom you provide more than half support)

- yes (must have complete names and social security numbers available for filing session)
- no

6. What type of income did you earn in 2022? (select all that apply) **

- wage income reported on Form W-2 (If yes, how many W2s do you have for 2022: _____)
- self-employed or business income (Ex: forms 1099-Misc., 1098s, K-1) (If yes, how many: _____)
- unemployment benefits reported on Form 1099-G (you must obtain digital or paper copy from DOL)
- retirement income reported on Form 1099-R, 1099-SSA
- investment income reported on Form 1099-INT, 1099-DIV, 1099-B or other Forms.

7. Did you pay qualifying childcare expenses during 2022? (paid by cash, check or money order)

- yes (must have provider name; and tax identification number (EIN) or social security number available)
- no

8. Did you pay child support through the child support system? (for non-custodian parents only)

- yes (you may qualify for the non-custodian parent tax credit)
- no (you do not pay child support; or you do, but don't pay through the child support system)

9. Did you have education expenses and/or tuition paid out of pocket? (paid cash, check, loan) ***

Yes (you have a digital or paper copy of Form 1098-T received from school)

No (you didn't have any out of pocket education expenses)

10. Did you receive a healthcare and mental hygiene worker's bonus?

Yes (you should have an amount in box 14 on your Form W-2 or a letter from your employer, you may qualify for a subtraction from income)

No

11. Did you receive a student loan forgiveness award from Higher Education Service Corporation (HESC)?

Yes (you should have Form 1099-C, you may qualify for a subtraction from income)

No

12. Do you have a New York State driver license or State issued ID?

yes (this information is required on the state return; if missing, it will cause delay in processing of tax return)

no (I don't have a New York State driver's license or ID)

13. Would you like your refund to be direct deposited to your bank account?

yes (please have your routing/ABA number and account number during filing session)

no (will be a paper check refund – note that you can get your refund much faster with direct deposit)

14. Complete this section if you are a self-employed individual or operate a business as sole proprietor. ****

Complete the following categories with the total amount of expenses paid during the year as they pertain to your self-employed or business activities. **(Or you may use the Tax Deduction Tracker provided at the end of this intake by the NYS Dept. of Taxation and Finance)**

Examples include but not limited to:

home office: \$ _____

internet and phone: \$ _____

health insurance premiums: \$ _____

meals: \$ _____

travel: \$ _____

rent: \$ _____

vehicle use: \$ _____

interest: \$ _____

publications and subscriptions: \$ _____

education: \$ _____

business insurance: \$ _____

startup cost: \$ _____

advertising: \$ _____

retirement plan contributions: \$ _____

self-employed tax: \$ _____

Notes

Question 3:

* If you are being claimed as a dependent on another person's return and you earned \$3,100 or more in 2022, you MUST file a New York State return even if you are being claimed. If you earned less than \$3,100 and tax was withheld from your income, you should still file a return to claim a refund of the tax withheld. If you are claimed as a dependent, the person claiming you will receive all credits associated with claiming a dependent.

Question 6:

** If you received unemployment benefits from the state of New York, the Department of Labor (DOL) will not mail you

Form 1099-G. Unemployment recipient must access Form 1099-G through their DOL online account. Please keep in mind that if they worked elsewhere (NJ, CT) the unemployment insurance benefits would be paid by that state.

Question 9:

*** Those that paid college tuition with student loans:

- a. If a loan was issued to you directly and you paid the tuition, you will receive a 1098-T. Refer student to school website.
- b. If a loan was given directly to the school, you may not receive a 1098-T, but you can confirm with the school.
- c. If you paid interest on student loans in 2022, bank will send form 1098-E. This form will be used to take a deduction for the interest paid.

Question 14:

**** If self-employed, please advise filer to have receipts and other documents to verify their income and expenses.

Documents should be separated into different categories for both income and expenses. Filer can use our Self-employed Tax Deduction Tracker and Transportation Driver Mileage Worksheet. For vehicle use, filer may use the standard mileage rate or their actual expenses.



Tax Deduction Tracker

Here is an example of a worksheet to record your monthly income and tax deductions from self-employed or business activity. Do not log activity related to your personal use or services.

	January	February	March	April	May	June
Total income						
Tax deductions						
Advertising						
Commission and fees paid						
Mileage						
Parking and tolls paid						
Interest on a car loan¹						
Supplies²						
Office expense						
Mortgage³						
Insurance⁴						
Cost of your cell phones⁵						
Repairs and maintenance						
Taxes and licenses						
Other expenses						
Total tax deductions						
Net income						

1. Interest - if you use the car for personal and business use
2. Supplies - used for you self-employed or business activity
3. Mortgage - if paid to banks, etc.
4. Insurance - any extra coverage you obtain for your self-employed or business activity
5. Cell phone - 100 percent deductible if you use it just for self-employed or business activity, otherwise you can deduct the percentage used for self-employed or business activity.

	July	August	September	October	November	December
Total income						
Tax deductions						
Advertising						
Commission and fees paid						
Mileage						
Parking and tolls paid						
Interest on a car loan ¹						
Supplies ²						
Office expense						
Mortgage ³						
Insurance ⁴						
Cost of your cell phones ⁵						
Repairs and maintenance						
Taxes and licenses						
Other expenses						
Total tax deductions						
Net income						

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2. Supplies - used for you self-employed or business activity
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