Schedule EIC – Checksheet

Practice Lab • $3,400 Federal Refund N/A Refund Amount Help

Sheryl Income Deductions Other Taxes Payments & Estimates Miscellaneous Forms

Enter the Form Number..

- Basic Information
- Federal Section
- Health Insurance
- State Section
- Summary/Print
- e-File
- 2015 Amended Return
- Save & Exit Return
- Scanned Documents

EIC Checklist

Qualifying Information

Was the taxpayer a nonresident alien for any part of the year?	No
Is the taxpayer (or spouse) a qualifying child of another person?	No
Did you complete form 8867 and/or perform the due diligence required based on current information provided by the taxpayer or reasonably obtained by you?	No
Did you ask this taxpayer any additional questions that are necessary to meet your knowledge requirement?	Does Not Apply
Did you comply with the EIC due diligence knowledge requirements?	Yes

To comply with the EIC knowledge requirement, you must not know or have reason to know that any information used to determine the taxpayer's eligibility for, and the amount of, the EIC is incorrect. You many not ignore the implications of information furnished to or known by you, and you must make reasonable inquiries if the information furnished appears to be incorrect, inconsistent, or incomplete. At the time you make these inquiries, you must document in your files the inquiries you made and the taxpayer's responses.

Records

Did you keep the records found below?	No

--Form 8867 (or your own form or files).
--The EIC worksheet(s) or your own worksheet(s).
--Record of how, when, and from whom the information used to prepare the form and worksheet(s) was obtained.

Qualifying Child #1 - Artis

Is this child currently, or intended to be, a qualifying child on any other individual's tax return?	No

Qualifying Child #2 - Courtney

Is this child currently, or intended to be, a qualifying child on any other individual's tax return?	No

Documents used to determine Residency

- [ ] School records or statement
- [ ] Landlord or property management statement
- [ ] Health care provider statement
- [ ] Medical records
- [ ] Child care provider records
- [ ] Placement agency statement
- [ ] Social service records or statement
- [ ] Place of worship statement
- [ ] Indian tribal official statement
- [ ] Employer Statement
- [ ] Other
- [ ] Did not rely on any documents, but made notes in file
- [ ] Did not rely on any documents

Continue

Our answer should be YES. A NO answer will eliminate EIC from the return.