

**Supplemental Information Sheet Tax Year 20\_\_**



Taxpayer Social Security Number	Taxpayer Name Per Social Security Card	
Spouse Social Security Number	Spouse Name Per Social Security Card	

**Can you be claimed as a dependent on another persons return?** Yes  No  **If YES**  →

**Dependents do not take your own exemption**

Name of Person Who Can Claim You      Social Security # (if known)      Relationship

**Did you or your spouse**

a. Receive the Alaska PFD?  Yes  No       c. Receive commercial fishing income?  Yes  No       e. Receive a Form 1099-MISC or 1099-NEC?  Yes  No

b. Have the Alaska PFD taken away?  Yes  No       d. Receive a native/corporation dividend?  Yes  No

**If Yes, what was done to earn this income?**

**If Yes, please list the corporation(s):**

*To claim Head of Household filing status you must be either Single or Married Filing a Separate return and have lived apart from your spouse for the last six months of the year. You must have a qualifying dependent. Only one person in the home can be Head of Household. Ask your preparer for details.*

**If you are single or MFS and qualify, did you pay more than half the cost of keeping up the home for yourself and a qualifying dependent?**  Yes  No

List all dependents. You may be able to claim a dependent as a qualifying child or as a qualifying relative. You may be able to claim a person that is not related to you if the person lived with you for the entire year and made less than the personal exemption amount and you provided for more than half of their support. You may be able to claim your child that is over 18. Make sure that the person that you claim as a dependent does not claim themselves on their own return. Ask your preparer and check out the dependency brochure.

Dependents Full Name <small>Must match Social Security card -----</small>	Age	Birth Date <small>(mm/dd/yy)</small>	Social Security Number	Dependents Legal Relationship to You e.g., Son, Daughter, Grandchild, None	Did you provide over 50% of the support for this dependent (Yes/No)	Number of months dependent lived with you last year	US Citizen, Resident of US, Canada or Mexico (Yes/No)	Full time student last year? (Yes/No)	Receive the AK PFD last year? (Yes/No) If garnished still yes	Is the dependent your qualifying child under 19 or under 24 and a full time student? <b>If not</b> , the dependent's income must be less than \$4,300 (Yes/No)	Did this person have income other than the PFD, such as wages, self employment, Native/Corp dividends, Social Security? <b>If so</b> , they may need a return of their own even if they are your dependent. Describe

Were any of the dependents married as of December 31<sup>st</sup> or can anyone else claim the dependents on their tax return?  Yes  No

Does anyone else live in the home?  Yes  No

**If you are due a refund would you like direct deposit?**  Yes  No       If yes, Bank \_\_\_\_\_ Account Number \_\_\_\_\_      Checking or Savings

Preparer Complete Grey Area	
Preparer	
Site	

**NOTES:**

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This form is required whenever the taxpayer's tax return is completed and/or quality reviewed in a non-face-to-face environment. The site must explain to the taxpayer the process this site will use to prepare the taxpayer's return. If applicable, taxpayers must also be advised of all procedures and the associated risk if their data will be transferred from one site location to another site location.

**Part I - To be completed by the VITA/TCE site: Main/Intake site name: Alaska Business Development Center**

Site address: 840 K Street, Suite 202, Anchorage, Alaska 99501      Site identification number (SIDN): 64117282  
 Site Coordinator: Gary Burleson      Site contact name: Gary Burleson      Site contact telephone number: 907-562-0335

**This site is using the following Virtual VITA/TCE method(s) to prepare your tax return:**

- A. Drop Off Site:** This site uses a drop off process which includes the site maintaining personal identifiable information (social security numbers, Form W-2, etc.) to prepare the tax return at the same site but at a later time. In this process, you will come back to the same site for the quality review and/or signing the completed tax return. The site will explain the method it will use to contact you if additional information is needed to prepare and/or quality review the tax return.
- B. Intake Site:** This method includes the taxpayer leaving their personal identifiable information (social security numbers, Form W-2 and other documents) at the site in order to prepare and/or quality review the tax return at another location. In this process, the taxpayer's tax return information may be sent to another location for one or more of the following reasons; interviewing the taxpayer, preparing the tax return, or performing a quality review. The taxpayer may come back to the intake site for the quality review or to review and sign the completed tax return.
- C. Return Preparation and/or Quality Review Only Site:** This site may receive returns from one or more intake sites to prepare and/or quality review returns. This site generally does not take walk-in or appointments from other taxpayers in their location.
- D. Combination Site:** This site prepares returns for other permanent or temporary intake sites as well as assisting walk in and/or appointment only taxpayers within their location.
- E. 100% Virtual VITA/TCE Process:** This method includes non face-to-face interactions with the taxpayer and any of the VITA/TCE volunteers during the intake, interview, return preparation, quality review, and signing the tax return. The taxpayer will be explained the full process and is required to consent to step-by-step process used by the site. This includes the virtual procedures to send required documents (social security numbers, Form W-2 and other documents) through a secured file sharing system to a designated volunteer for review.

**Part II: The Sites Process:**

Explain how each process will be followed to assist taxpayers remotely. How will the site manage:

1. Scheduling the appointment: First come first served
2. Securing Taxpayer Consent Agreement: Form 14446 secured with intake
3. Performing the Intake Process (*secure all documents*): Verified upon receipt
4. Validating taxpayer's authentication (*Reviewing photo identification & Social Security Cards/ITINS*): Secured with intake
5. Performing the interview with the taxpayer(s): In person or by phone
6. Preparing the tax return: At the Main/Intake site or remotely
7. Performing the quality review: In person or by phone
8. Sharing the completed return: As designated by the taxpayer
9. Signing the return: Taxpayer will sign the return or otherwise give authority to E-file the return
10. E-filing the tax return: From the Main/Intake site

**Page three of this form will be maintained at the site with all other required documents.**

**Part III: Taxpayer Consents:**

**Request to Review your Tax Return for Accuracy:**

To ensure you are receiving quality services and an accurately prepared tax return at the volunteer site, IRS employees randomly select free tax preparation sites for review. If errors are identified, the site will make the necessary corrections. IRS does not keep any personal information from your reviewed tax return and this allows them to rate our VITA/TCE return preparation programs for accurately prepared tax returns. If you do not wish to have your return included as part of the review process, it will not affect the services provided to you at this site. If the site preparing this return is selected, do you consent to having your return reviewed for accuracy, by an IRS employee?  
 Yes      No

**Virtual Consent Disclosure:**

If you agree to have your tax return prepared and your tax documents handled in the above manner, your signature and/or agreement is required on this document. Signing this document means that you are agreeing to the procedures stated above for preparing a tax return for you. (If this is a Married Filing Joint return both spouses must sign and date this document.) If you chose not to sign this form, we may not be able to prepare your tax return using this process. Since we are preparing your tax return virtually, we have to secure your consent agreeing to this process. If you consent to use these non-IRS virtual systems to disclose or use your tax return information, Federal law may not protect your tax return information from further use or distribution in the event these systems are hacked or breached without our knowledge. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature. If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov). While the IRS is responsible for providing oversight requirements to Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs, these sites are operated by IRS sponsored partners who manage IRS site operations requirements and volunteer ethical standards. In addition, the locations of these sites may not be in or on federal Property.

I am agreeing to use this site's Virtual VITA/TCE Process  Yes  No

Printed name		Printed name ( <i>spouse if married filing joint</i> )	
Date of birth	Last four digits Social Security/ITIN number	Date of birth	Last four digits Social Security/ITIN number
Date	Telephone number	Date	Telephone number
Email address		Email address	
Signature ( <i>electronic</i> ) <b>OR</b>		Signature ( <i>electronic</i> ) <b>OR</b>	
Signature ( <i>type/print</i> )		Signature ( <i>type/print</i> )	

**Signature Required**

**Spouse's Signature Required if Married Filing Joint**