**From:** [redacted]
**To:** *W&I M&P TFP PRA Comments
**Cc:** [redacted]
**Subject:** [redacted] OMB Control Number 1545-1964
**Date:** Monday, July 11, 2022 9:46:20 AM

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Good morning Andres,

Here are the collective comments of the our group on the 13614-C. We appreciate the opportunity to comment.

**Page 1 Comments**
**PART I**
#10. if yes, are they claiming you as a dependent?
#6 – What's the point in asking if the taxpayer is disabled. We have no ability in Taxslayer to input on the return.
**PART II**
**#1 Status**
Single – (rather than never married)

- need a status for those widowed more than 2 years (they dislike saying they've been widowed 20 years, etc.)
- Same for divorced more than 2 years with no children

Divorced – If not a single category, then three part this: check box

- Divorced – date of final decree in past 24 months (provide date)
- Divorced – date of final decree more than 24 months with dependent children (provide date)
- Divorced – more than 24 months

Widowed – If not a single category, then two part this: check box

- Widowed – past 24 months (provide date)
- Widowed – more than 24 months

**PAGE 2**

**In my perfect world, I'd regroup this entire page.** This page overwhelms clients. They often end up answering many of the questions incorrectly because they don't understand what they are.

**While this follows TaxSlayer, it doesn't follow logically for the clients. Here's how I would group all the questions on this page: P3 = Part III, etc.** I think they should be grouped by topic, and then by common and less common.
**<u>They should have an option to check (none) at the top of each group.</u>**

**PART III, PART IV and PART V**
Group #1
P3 #1 W2
P3 #2 Tip
P3 #12 Unemployment
P3 #7 Self-employment income
P4 #7 self-employment expenses
P3 #5 Refund
P5 #9 Marketplace
P5 #1 Have an HSA account?
Group #2
P3 #10 Disability
P3 #13 Social Security
P3 #11 Retirement Income
P4 #2 Contribution to retirement
Group #3
P3 #4 Interest
P3 #9 Stock/bonds
P3 #15 Other income
P4 #4 other expenses
Group #4
P4 #5 Childcare expense
P3 #3 Scholarships
P4 #3 College expenses…

P4 #8 Student loan interest
P5 #3 Adopt
P4 #6 educator expenses

Group #5

P5 #7 Make estimated payments
P5 #2 debt forgiveness
P5 #5 energy-efficient
P5 #10 stimulus (if needed for next year)
P5 #11 ATC (if needed for next year)

Group #6

P5 #4 EIC Disallowed
P3 #6 Alimony income
P4 #1 Alimony payments
P3 #8 Cash/check/virtual currency
P5 #6 First Time Homebuyers
P5 #8 Capital loss
P3 #14 Income (or loss) from Rental Property

**PAGE 2**

**The wording of questions – lead with the topic, then the question. Some commonly misunderstood questions include:**

P5 #4 – **Have you had any of these <u>disallowed</u>**? EIC, CTC, AOC. If so, what year? (this needs to be reworded like this. Almost all think it's asking if they got EIC)
P5 #5 – **Educator expenses** – As a teacher, aide...have you paid for supplies for your classroom?
P5 #9 – **Marketplace/Exchange/Obamacare** – many don't realize marketplace is Obamacare
P5 #2 **– Cancellation of debt –** Did you have….
P4 #8 – **Student loan payments** – Did you make any student loan payments this year?

**PAGE 2**
**Somewhat redundant questions**

P3 #8, P3 #15 are very similar. Could/should be combined

**PAGE 3**
**#6** (frankly, I think this should be on Page 2, but it probably won't fit. I'd put it in group #3)
**#3**
**#4**
#1
#2
#5

#7 through 14 should be a chart. It's very hard for people to figure out what lines up with what question
#11 through 14 – separate self from spouse. Easier for single people, i.e., your race then your ethnicity, then your spouses

If you have any questions, please let me know.

[redacted]
Janet Steiner
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