Dependent and Nondependent Information Worksheet   2014

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Part I — Personal Information

First name . . . _____ Middle initial . ___ Last name . . _____

Suffix . . . . . _____

Social security no. . . . _____

Date of birth . . . . . . _____ (mm/dd/yyyy)   age as of 12-31-2014 . . . . ___
Did this person pass away in 2014 (deceased)? . . ☐ Yes ☐ No Date of death . . . . _____

Relationship to taxpayer or spouse . . . . _____
CAUTION: If claiming a child other than your own, see **Relationship** in the Tax Help.

NOTE: The ability to set your answers to being the same as last year for the dependent is only
available in Step-by-Step mode and not in Forms mode.
Are the answers to the questions below for this person, to determine
whether they are your dependent, the same as they were last year? . . . . ► ☐ Yes ☐ No

Dependency code *. ____ —

*Dependency code is set based on your selections in the Dependency Exemption/EIC Smart Worksheet

Dependent is disabled . . . . ☐

Part II — Earned Income Credit and Child Tax Credit

Is this person a U.S. citizen, U.S. national, or a U.S. resident? . . . . ☐ Yes ☐ No
Is this person a resident of Canada or Mexico? . . . . ☐ Yes ☐ No

This person is adopted and you are a U.S. citizen or U.S. national   ☐
The adopted child lived with you all year   ☐
*If the child is adopted, you are a U.S. citizen or U.S. national and they lived with you
all year, they are considered to meet the citizen test and the U.S. citizen box will
automatically be checked yes.

Qualifying for the earned income credit * . ____ —

*EIC code is set based on your selections in the Dependency Exemption/EIC Smart Worksheet
Months lived with taxpayer in the United States . . . . ___

Check if this person is **not** a qualifying child for the child tax credit . . . . ☐

If this dependent has an ITIN issued by the IRS instead of a
social security number issued by the social security administration,
did they meet the substantial presence test? (see Schedule 8812 Instructions) ☐ Yes ☐ No

Part III — Dependent Care Expenses

Qualified child or dependent care expenses incurred and paid in 2014 . . . . _____