

+ Add Dependent (Type 2.c)



Name*

ph=First Name, bt=A, r,
max char 18

ph=Last Name, nl, r, bt=A,
max char 25

Date of birth*

ph=none, bt=D, r

Date shown here as a string after user's selection in format January 1st, 1999

Social Security Number*

ph=XXX-XX-XXXX, bt=E, r

☐

Does not have SSN (*Checking this should disable the SSN input block*)

Text Saying: If you know this dependent qualifies for certain credits, choose the appropriate option, if you are not sure, choose "guide me" (this option pops up only when the person didn't select "guide me" in filing status)

This person qualifies for :

nl, ph=none, bt=G, r

Selection Choices: (1) Child tax credit, or (2) Dependent credit or (3) guide me

This person qualifies for :
(if above is not guide me)

nl, ph=none, bt=G, r

Selection Choices: (1) Credit for child expenses, or (2) Credit for dependent expenses

This person qualifies to make your status Head of Household
(ask only when none of the options is "guide me" and user chose Filing status as Head of household)

Y

NO

the entire section below pops up when user chooses "guide me" anywhere

Relation with you*

nl, ph=none, bt=G, r

See design doc (Section 5.a + 5.b) for selection menu

Ques D-3

lets check for Qualifying child first

1. relation must be 5.a

2. age test

3. their own support test

4. marriage test

5. Residency test

If any stage fails, go to Qualifying relative questionnaire

How many months in <tax year> did this person live with you*?

ph=none, bt=A, r, digits
only, max 2

? <-- Text saying: include anytime spent in school, business
travel etc. It must be reasonable to assume that the absent
person will return to the home after the temporary absence.

Ques D-1

residency test
(qualifying child)

Did this person die (or was kidnapped) in <tax year>

Y

NO

Was this person a student for atleast 5 months in <tax year>?

(ask only if the person is younger than applicant or their spouse (if married), and > 18 and <24)

Y

NO

Ques D-6

age test
(qualifying child)

Is this person disabled (ask only if the age is >= 24)

Ques D-7

Did this person provide more than half of their own support in <tax year> ?

Y

NO

(qualifying child)

Is this person married?

Ques D-8

Is this person filing a joint return with someone ?

(ask only Ques D-8 is YES)

Ques D-9

Is the person filing a joint return only to get a tax refund?

(ask only Ques D-9 is "YES")

Would this person (or their spouse) owe taxes to the IRS if they filed separate return?

(ask D-8 is YES and D-9 is YES)

married person
test
(ask anyway)

only if a Qualifying child test fails, immediately come to testing Qualifying
relative

1. relation must be 5.a + 5.b

2. support test

If any stage fails, stop, not a dependent

Net income in <tax year> *

ph=none, bt=A, r, digits
only, max 2

? <--Text saying: If they didn't earn any income, enter 0. If they
did earn income, enter the amount from line of their tax return (qualifying relative)

Now we do "dependent test"

Are you filing this return jointly with this Dependent's other legal parent
(as determined by state law)
(ask only if MFJ and Relation is = *CHILD)

Ques D-5

Only if Relation = *CHILD && (file status != MFJ OR if above question is a "NO")

this test is only to find out if a "custodial parent" can give away rights OR
if a "non-custodial parent" can gain rights

Choose a status between you and the other parent of this person

nl, ph=none, bt=G, r

See design doc (Section 6) Ques D-2
for selection menu If dead, test fails

Was this person in custody of one or both parents for more than half of <tax year> ?
(ask only if Ques D-2 is not "other parent is dead")

Y

NO

Ques D-3
(if no, then test fails, no
exchange of rights)

Did this person receive support from one or both parents in <tax year> ?
(ask only if Ques D-3 is YES)

Y

NO

Ques D-4
(if no, then test fails, no
exchange of rights)

Are you a custodial parent of this person?
(read the ? text carefully and choose)
(ask only if above is YES, month lived <=6 or the dependent died)

? <-- Text is in section 7 of design doc

Y

NO

Ques D-5
this determines custody, if
we cannot figure out custody
from Ques D-1

Did you sign a declaration to not claim this person as your dependent in
<tax year>?
(ask only if Ques D-5 is YES)

Has the other parent signed a declaration to not claim this person as
their dependent in <tax year>?
(ask only if Ques D-5 is NO)

Did you or your spouse provided more than half of the person's support in
<tax year>?
(ask only if MFJ)

Y

NO

You provided more than half of support for this person in <tax year>
(ask only if the above RED box test failed)

☐☐

Can someone else claim this dependent?

☐☐

Was this person a US citizen or US national for some part of <tax year>?

☐☐

Ques D-8

Was this person a resident of Mexico or Canada in <tax year>?
(ask only if Ques D-8 is no)

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