

Are you a permanent resident, or a resident for tax purposes?

NO:
Out of Scope: If they are IU student, direct them to contact www.ois.iu.edu

YES:
Was your combined household income **less** than \$58,000?

NO:
Out of Scope

YES:
Do you have more than one income source other than social security?

NO:
SEE SENIORS CREDIT

YES:
Do you have any income from other states outside of Indiana?

YES:
OUT OF SCOPE

NO:
Did you do any of the following: Own or sell rental property, sell a business, have a net loss on a business or have more than \$35,000 in business expenses?

YES:
OUT OF SCOPE

NO:
Do you have any foreign income, farm income OR a schedule K-1 (Partner's Share of Income, Deductions, Credits, etc.)?

YES:
OUT OF SCOPE

NO:
Are you Self Employed?

NO:
YOU ARE IN SCOPE!
Continue to [Appointment Plus](#) to make appointment

YES:
OUT OF SCOPE

YES:
Do you receive a premium tax credit health insurance deduction?

NO:
Did you contribute to a retirement plan with your self-employed business?

YES:
OUT OF SCOPE

NO: YOU ARE IN SCOPE!
Continue to [Appointment Plus](#) to make appointment

What to say if you come to an "Out of Scope" box:
"Unfortunately, based on your situation we cannot prepare your tax return this year. You can visit monroeunitedway.org/freefile to find a software that will allow you to prepare and file yourself online for free or you can find a paid preparer to assist you..."

SENIORS CREDIT:
If the only income you received during 2021 was your social security or the SSEB portion of tier 1 railroad retirement benefits, your benefits generally aren't taxable and you probably don't have to file a return. You are probably eligible for an Indiana Credit for the Elderly. All you need to do is complete a very simple one-page form and mail it to the state dept. of revenue. If you would like to give us your name and address, we will mail you the form and a pre-addressed envelope to help you claim the credit. The credit is usually \$50-100, depending on your total income. (We are not scheduling these type of taxpayers for a full appointment.)

Add their name and address as you would write it on an envelope to be mailed to the [Senior Credit list.](#)

Free Community Tax Service Scope Decision Tree 2022

The premium tax credit is to help people afford health insurance through the [Health Insurance Marketplace](#). Click to learn more.