



Site Manager Use Only:  
Efile or Paper?

# Tax-Aid Questionnaire 客戶信息表

Instructions: Complete pages 1-8 and return to Tax-Aid

说明指南：請填寫1-8頁並返還給Tax-Aid

Tax-Aid Volunteer Screener Name: \_\_\_\_\_

Client #: \_\_\_\_\_

Tax-Aid Volunteer Station #: \_\_\_\_\_

## Part 1 - Your Information

Please Check Your Answers To Yes/No Questions 您的信息 (請對以下的問題圈出 "是" 或 "否")

- Have you already filed a tax return this year?/ 您今年是否已完成報稅?  Yes/是  No/否
  - Have you or your spouse received any letters from the IRS?/您或您的配偶有沒有收到稅務局的信件?  Yes/是  No/否
- If you have an Individual Taxpayer Identification Number (ITIN), please list it.  
您有ITIN號碼嗎? \_\_\_\_\_

- Did you file your tax return last year, for **2016**?/您去年 (2016) 是否有報稅?  Yes/是  No/否

Taxpayer's name/ 您的名字

First / 您的名字

Middle / 中間名字縮寫

Last / 姓氏

Taxpayer's Birth Date 您的出生日期

Social Security Number  
社会安全號碼

Employer/僱主

Taxpayer's Job Title 您的職位

- Are you a U.S. citizen? / 你是否為美國公民?  Yes/是  No/否
- Are you a full-time student? / 你是否為全職學生?  Yes/是  No/否
- Are you legally blind? / 你是否法定失明?  Yes/是  No/否
- Last year were you permanently disabled? / 去年起，您是否為永久殘障?  Yes/是  No/否
- Are you claimed as a dependent on another person's tax return such as your parent? 您是否在其他報稅表上被列為親屬列入您父母的表?  Yes/是  No/否

Spouse's name 配偶的名字

First / 您的名字

Middle / 中間名字縮寫

Last / 姓氏

Spouse's Birth Date 配偶的出生日期

Spouse's Social Security

Number 配偶社會安全號碼

Employer/僱主

Spouse's Job Title 配偶的職位

- Is your spouse a U.S. citizen? / 配偶是否為美國公民?  Yes/是  No/否
- Is your spouse a full time student? / 配偶是否為全職學生?  Yes/是  No/否
- Is your spouse legally blind? / 配偶是否法定失明?  Yes/是  No/否
- Last year was your spouse permanently disabled?/去年起，您的配偶是否為永久殘障?  Yes/是  No/否
- Was your spouse claimed as a dependent on another tax return?/您的配偶是否曾在其他報稅表被列為親屬?  Yes/是  No/否

Client: Go to next page

客戶：簽署一份近似頁



Taxpayer's Mailing Address / 郵寄地址		
City, State, Zip Code/ 城市, 州名, 郵區編碼		Apt./Unit 公寓/單位 #
Home Phone / 您的家庭電話號碼		Spouse mobile Phone Number 配偶移動電話號碼
Mobile Phone Number / 納稅人的手機號碼		Text reminder okay/可用短信提醒嗎?
Email Address / 您的電子郵件地址		Spouse email address 配偶電子郵箱地址

**Part 2 - How Are You Filing? / 您用何種身份報稅?**

- Single (including registered domestic partnerships, civil unions, or other formal relationships under state law) 單身 (包括已註冊的伴侶關係或州法承認的其他正式關係)
- Married filing separately 已婚, 但分開報稅
- Date of final decree or separate maintenance agreement 最終離婚判決書日期, 或分居扶養協議日期  Yes/是  No/否
- Married filing jointly 已婚, 共同報稅
- Was your marriage recognized under state law for the state(s) you are filing in? 您的婚姻是否被您所報稅的州承認?  Yes/是  No/否
- Is your spouse here today? 請問您的配偶今日是否在場?  Yes/是  No/否
- Did you get married in **2018**? 請問您是否於**2018**年結婚?  Yes/是  No/否
- Head of Household 單身, 但有撫養其他人
- Did your spouse live with you during any part of the last six months of the tax year? 在過去6個月, 您的配偶曾否與您同住?  Yes/是  No/否
- Qualifying Widow(er) With Dependent Child 喪偶少於兩年, 但有扶養其他人

Year of spouse's death 配偶死亡年份 :

if you/your spouse were a victim(s) of identity theft and received a e-filing PIN from the IRS, what is the PIN?/ 如果您/您的配偶是身份盜竊的受害者, 並從國稅局獲得了電子申請PIN碼, 那 么PIN碼是什麼?

如果您/您的配偶是身份盜竊的受害者, 並從國稅局獲得了電子申請PIN碼, 那 么PIN碼是什麼?

You 您

Your spouse 配偶:

IP PIN # 身份保護PIN碼 :	
type of ID: 身份證明種類 :	
ID #: 身份證明號碼 :	

**Client: Go to next page**

客戶: 簽署一份近似頁



You 您	Your spouse 配偶:
State ID issued: 頒發州 :	
Issue date: 頒發日期:	
Expiration date: 失效日期 :	

**If you want Direct Deposit for a tax refund, list your banking information. / 如有退稅,是否想直接轉帳?**

**Apply refund to any balance due? 用退稅款應付餘額欠款?      Yes/是    No/否**

Bank name/ 銀行名稱:

Routing number/ 匯款路線號碼:

Account number/ 銀行帳號:

### Part 3 - Dependents / 您的被撫養人

Have you or your spouse adopted a child?/ 您或您的配偶是否曾經領養過小孩 ?

Yes/是     No/否

Dependent's Full Name / 被撫養人的名字 (First/名, Middle Initial/中間名縮寫, Last/姓氏)	Date of Birth 出生日期	Social Security Number or ITIN 社会安全号码	# Months Lived with Taxpayer 有几个月与您一起住	Full-time Student? 是否為全職學生?	Relation (son, daughter, etc.) 與您的關係 (兒子, 女兒, etc.)	Totally and Permanently Disabled? 是否為永久殘障?
1				<input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否		<input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否
2				<input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否		<input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否
3				<input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否		<input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否
4				<input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否		<input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否
5				<input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否		<input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否

**Client: Go to next page**

客戶: 簽署一份近似頁



**Part 4 - Last year, did you, your spouse, or all your dependents... / 您或您的配偶去年是否收到 ...**

1. Did you, your spouse, and all of your dependents have health insurance for the full year? / 您的配偶或您的扶養人是否有全年的醫療保險? 1.  Yes/是  No/否
2. Receive one or more of these forms? (Check the box) / 收到以下列表? (若有, 請勾選)  
 1095-B表  1095-C表 2.  Yes/是  No/否
3. Have coverage through the Marketplace (Exchange)? / 是否經由Marketplace(交易所)投保?若是, 請提供1095-A表 3.  Yes/是  No/否
  - a. If yes, receive an advanced payment from the Marketplace to help pay your monthly health care payments? 若是, 是否每月從Marketplace收到一筆用以支付醫保費的預付款? a.  Yes/是  No/否
  - b. If yes, is everyone listed on your Form 1095-A being claimed on this tax return?若是, 是否在您1095-A表上的每一個人皆在此份報稅表中? b.  Yes/是  No/否
4. Have an exemption granted by the Marketplace? / 是否從Marketplace獲得豁免的資格? 4.  Yes/是  No/否

**Part 4A - Did You or Your Spouse Receive...? / 您或您的配偶是否收到...?**

1. Wages / 工資 (W-2) 1.  Yes/是  No/否
2. Tips/ 小費 2.  Yes/是  No/否
3. Scholarships / 獎學金 (1098-T) 3.  Yes/是  No/否
4. Interest/dividends / 銀行利息 / 股票利息 (1099-INT, 1099-DIV) 4.  Yes/是  No/否
5. State/local tax refund / 州退稅 (1099-G) 5.  Yes/是  No/否
6. Alimony income or separate maintenance payments/ 贍養費 6.  Yes/是  No/否
7. Self-employment income / 現金或自雇收入 (1099-MISC, Cash) 7.  Yes/是  No/否
8. Income for work not reported on Forms 工作收入沒有申報在 W-2/1099 8.  Yes/是  No/否
9. Transactions of stocks / bonds / real estate / 買賣股票 / 債券 / 房地產 (1099-S, 1099-B) 9.  Yes/是  No/否
10. Disability income payments (insurance / workers compensation) / 殘障收入 (保險賠款 / 職業傷害賠償) 10.  Yes/是  No/否
11. Pension, annuity, and/or an IRA distributions / 養老金 / 退休金 / 年金 / 個人退休帳戶提款 (1099-R) 11.  Yes/是  No/否
12. Unemployment compensation / 失業救濟金 (Form 1099-G) 12.  Yes/是  No/否
13. Social Security, Railroad Retirement / 社會安全福利金 / 鐵路退休員工福利金 (SSA-1099, RRB-1099) 13.  Yes/是  No/否
14. Income (or loss) from rental property / 物業出租盈利或虧損 14.  Yes/是  No/否
15. Other income (gambling/lottery, prizes/awards, jury duty, Schedule K-1, etc.) / 其他收入(博彩/彩票, 獎品獎項, 陪審團職責, 時間表 K-1 等) 15.  Yes/是  No/否

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客戶: 簽署一份近似頁



**Part 4B - Did You or Your Spouse Pay...? / 您或您的配偶是否支付...**

- |   |  |
|---|--|
| 1. Rent / 租金  | 1. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否  |
| 2. Alimony or separate maintenance payments/ 贍養費  | 2. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否  |
| 3. Contributions to a retirement account/ 退休戶口供款  | 3. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否  |
| 4. Post secondary education expenses / 高等學院學費 (1098-T)  | 4. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否  |
| 5. Medical expenses / 自付醫療費用  | 5. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否  |
| 6. Home mortgage interest / 房屋貸款利息 (1098)   | 6. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否  |
| 7. Student loan interest / 學生貸款利息 (Form 1098-E)   | 7. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否  |
| 8. Real estate taxes or personal property taxes / 物業稅 / 個人資產稅 (1098)                                | 8. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否  |
| 9. Charitable contributions / 慈善捐贈  | 9. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否  |
| 10. Child or dependent care expenses such as daycare / 日間托兒費  | 10. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否 |
| 11. For supplies as an educator (i.e., teacher, teacher's aide, counselor, etc.) / 教師的教育用品支出        | 11. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否 |
| 12. Expenses related to self-employment income or any other income you received / 與自雇收入 / 其他收入相關的支出 | 12. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否 |

**Part 4C - Did you have... 您是否有**

- |  |   |
|--|---|
| 1. Health Savings Account / 保健儲蓄賬戶 (5498-SA, 1099-SA, W2 with Code W in box 12)                            | 1. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否 |
| 2. Have debt cancelled/forgiven / 債務取消 / 赦免 (1099-C, 1099-A) Credit card or mortgage. 信用卡或抵押貸款             | 2. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否 |
| 3. Buy, sell, foreclose (COD) your home / 買 / 賣 / 法拍 你的物業 (Form 1099-A)                                    | 3. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否 |
| 4. Have Earned Income Credit (EIC) disallowed a prior year / 您的低收入家庭福利優惠 (EITC) 曾否被禁止                      | 4. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否 |
| 5. Purchase/install energy-efficient home items (such as windows, etc.) / 您有否購買 / 安裝高效節能家用物品 (如窗戶等)        | 5. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否 |
| 6. Live in an area that was affected by a natural disaster / 您是否生活在受自然災害的地區. If yes where? 如是 · 則哪裡? _____ | 6. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否 |
| 7. Estimated tax payments for <b>2018</b> / 聯邦預繳稅  | 7. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否 |
| 8. A "capital loss carryover" (on Form 1040 Schedule D) / A74 您是否有“資本損失結轉” (F1040附表 D)                     | 8. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否 |
| 9. Apply last year's refund to this year's taxes / 將去年的退稅用於支付今年的稅款   | 9. <input type="checkbox"/> Yes/是 <input type="checkbox"/> No/否 |

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客戶: 簽署一份近似頁



**FOR TAX AID USE ONLY**

**INCOME SUMMARY**

	Taxable Amount		Non-Taxable Amount
<input type="checkbox"/> Wages (W-2/1099)		<input type="checkbox"/> SSA/SSI	
<input type="checkbox"/> Interest/Dividends		<input type="checkbox"/> AFDC	
<input type="checkbox"/> Schedule C		<input type="checkbox"/> Gen. Asst	
<input type="checkbox"/> IRA/401(k)/Pension		<input type="checkbox"/> Other	
<input type="checkbox"/> Other			
<input type="checkbox"/> TOTAL INCOME			

Is the taxpayer below our \$54,000 gross income (taxable) requirement?

Yes  No

Does the taxpayer NEED to file a return?

Yes  No

Withholding

Earned Income Credit

Estimated Tax Payments

Renter's Credit

Direct Deposit Verified

Client Renumbered?

EFile?

Critical Diagnostics cleared?

ERO PIN? Yes / No

**Client: Go to next page**



客户: 签署一份近似页



### Taxpayer Agreement to Disclose

We **will not** share or use personal identifying information including your social security number, ITIN, date of birth, refunds or personal financial information. We will only use your contact information to inform you of other services that may benefit you. We will use and keep your data combined with THOUSANDS of other taxpayers for the duration of the free tax preparation program to share results like this:

Tax-Aid **2018** Results  
**2,785** tax returns  
**\$752,074** in Earned Income Tax Credit  
**\$2,745,822** million in total refunds

The following persons, groups or organizations receive the combined data results:

- Free tax preparation program donors and volunteers
- Various media partners
- Elected officials and other program supporters
- General public

### Consent to Disclose

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution. You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. 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. 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 email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

Yes, I agree to share my tax return information with the above persons, groups or organizations

No, I do not agree to share my tax return information with the above persons, groups or organizations

Name(s)

Date

Signature

Spouse's Signature

Client: [Go to next page](#)

客户: 签署一份近似页





**披露信息協議:**

絕不會泄露或使用您的個人身份信息，包括社會安全號碼，ITIN（納稅者身份號），出生日期，報稅信息 或其他個人財務信息。我們將只使用您的聯絡信息，用于通知您其他可能使您受益服務。您的信息將與數千名從我們這里得到服務的報稅人的信息匯總在起，匯總信息將以如下形式出現在各種可能的共享場合：

Tax-Aid 2018  
2,785  
\$752,074 in Earned Income Tax Credit  
\$2,745,822 million

以下人士、團體或組織可能獲得匯總數據：

- 免費稅務籌劃方案的捐助者和志願者
- 若干媒體合作夥伴
- 民選官員和其他組織的支持者
- 一般民眾

**披露信息授權:**

按聯邦法律的規定，我們應向您提供此授權表格。除非得到法律的授權，未經您的同意，我們不能將您的報稅信息向與報稅無關的第三方披露。如果您授權披露您的報稅信息，聯邦法律將不再保護您的報稅信息免于被進口步使用或擴散。您並不是必須填寫此表格。如果您的簽字授權是有條件的，那麼授權將被視為無效。您可以指定授權的有效期，如果您不指定時間，那麼有效期將被默認為年。如果您認為，在未經法律授權也未經您授權的情況下，您的報稅信息被泄露或被不正當地使用了，您可以考慮通過電話或電子郵件聯繫財政部稅務總局監察長（TIGTA），電話：1866-366-4484，電子郵件：[complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov)。

- 是的，我同意我的報稅信息與上述人士、團體或組織共享
- 不，我不同意我的報稅信息與上述人士、團體或組織共享 organizations

姓名	<input type="text"/>	日期	<input type="text"/>
簽名	<input type="text"/>	配偶簽名	<input type="text"/>

注：此文件為翻譯件，若出現歧義，請以原文為準。





Tax-Aid client: remove these 3 pages and read while your tax return is being prepared

致Tax-Aid客戶：在您移除和閱讀這三頁時您的稅表正被志願者準備和完成

You are responsible for the information in your tax return. We created this checklist to help you double check your tax return.

Usted es responsable para la información en su declaración de impuestos. Usa esta lista para verificar su información en su declaración.

您須對您的納稅申報表中提供的資訊負責。我們建立了此清單，以幫助您仔細檢查您的納稅申報表。

### Client Checklist

Tax-Aid is a nonprofit organization that provides high-quality tax return preparation for Bay Area families and individuals with incomes less than \$54,000. Tax returns are prepared at no cost to clients by volunteers who donate their time.

Tax-Aid es una organización sin fines de lucro que ofrece preparación de declaración de impuestos de alta calidad para individuos y familias de la zona de la bahía con ingresos menos de \$54,000. Voluntarios donan su tiempo preparan declaraciones de impuestos sin costo a los clientes.

Tax-Aid 為非營利性組織，提供灣區年收入少於\$54,000的家庭或個人優質的納稅申報準備。免費報稅服務來自志工撥冗參與。

Tax-Aid does not keep paper copies of your tax return. Please keep a copy of your tax return for your records.

Tax-Aid no guarda copias en papel de su declaración de impuestos. Por favor, guarde una copia de su declaración de impuestos con sus papeles importantes

Tax-Aid 不會保存您退稅文件的紙本，請自行保留此紙本文件作為記錄。

- Are you getting a refund today? / ¿Recibe usted un reembolso hoy? / 您今天是否得到退稅  Yes/Sí / 是  No/ 否  
If yes how much/ ¿Si sí, cuantos / 如是，金額為
- If you owe money, how much do you owe / Si necesita pagar, cuantos / 如您須補納稅，請問應繳金額是
- Do you know how to make a payment for the taxes you owe? / ¿Sabe como hacer pago por los impuestos? / 請問您知道該如何支付您所應繳稅款嗎?  Yes/Sí / 是  No/ 否
- Do you have to make estimated tax payments during the year? / ¿Necesita hacer pagos durante el año? / 請問您是否需要核算今年應繳稅額?  Yes/Sí / 是  No/ 否
- Do you know how to make those payments? / ¿Sabe como hacer estos pagos? / 您知道如何繳納嗎?  Yes/Sí / 是  No/ 否

**Client: Go to next page**

客戶：簽署一份近似頁



- Is your name spelled correctly? / ¿Se escribe correctamente su nombre? / 請問您的姓名是否正確?  Yes/Sí / 是  No/ 否
- Are the names of your spouse and dependents spelled correctly? ¿Los nombres de su cónyuge y sus dependientes están escritos correctamente? / 請問您的配偶及家屬姓名是否正確?  Yes/Sí / 是  No/ 否
- Is your social security number/ITIN correct? / ¿Su seguro social / ITIN es correcto? / 請問您的社會安全碼是否正確?  Yes/Sí / 是  No/ 否
- Are those numbers correct for your spouse and dependents? / ¿Son los números correctos para su cónyuge y sus dependientes? 請問您的配偶及親屬的社會安全碼是否正確?  Yes/Sí / 是  No/ 否
- If you are taking a direct deposit of your tax refund, is the bank account and routing number correct? / Si está tomando un depósito directo de su reembolso de impuestos, ¿es correcta la cuenta bancaria y el número de ruta? 如果您希望將應退金額直接存入您的銀行帳戶，請確認存戶資訊是否確?  Yes/Sí / 是  No/ 否
- Does the income on your tax return match your W2 and 1099 tax forms? / ¿Los ingresos de su declaración de impuestos coinciden con los formularios de impuestos W2 y 1099? 請問您納稅申報表上的申報所得是否與您的 W2 及 1099 表一致?  Yes/Sí / 是  No/ 否



## Refund Information & What to Expect/ 退稅相關資訊與期待

Dear Valued Clients,

Tax-Aid is a non-profit organization that provides high-quality tax return preparation for Bay Area families and individuals with incomes less than \$54,000. These returns are prepared by our dedicated volunteers who donate their time at no cost to you.

Tax season is very busy and there are a large number of clients who we help. We understand that your time is valuable and you expect to receive your refund quickly after having your tax returns prepared. We work diligently to make sure all of your information is correct to ensure that you get the refund you deserve.

We would like for all of our clients to appreciate the hard work and dedication our volunteers contribute to serve you the best they can. Refunds can take up to 3 weeks to arrive. After 3 weeks it is ok to contact Tax-Aid to check the status of your return. Please be patient and understand we offer a service free of charge and we prepare taxes for the entire Bay Area. Each year our dedicated volunteers help 5,000 clients! We appreciate your trust in us and look forward to future tax seasons with you!

**To check your federal refund go to: [www.irs.gov](http://www.irs.gov) and click the “where is my refund?” link or call (800) 829-1954.**

**Make sure to have your social security number, filing status and exact refund amount ready! You can find this on the copy of your tax return.**

**To check your state refund go to: [www.ftb.ca.gov](http://www.ftb.ca.gov) and click the “where’s my refund?” link or call (800) 852-5711.**

親愛的客戶們：

Tax-Aid 為非營利性組織，提供灣區年收入少於\$54,000的家庭及個人優質的納稅申報準備。免費報稅服務來自志工撥冗參與。

我們協助許多的客戶在這忙碌的稅季，我們理解您的時間寶貴，期望能在最快的時間取得您的退稅，我們勤奮且用心地確認您

的資訊的正確性是為了確保您取得應得的退稅金額。

我們期望我們的客戶能用感激的心態對待在此奉獻時間去服務的志工。一般而言，退稅流程需耗時三週。如三週後仍未收到退稅，您可以與 Tax-Aid 聯絡，並確認目前的退稅進度。由於此免費服務將提供給所有灣區的居民，我們的志工平均每年服務約 5000 以上的灣區區民，請友善地理解並耐心等待。我們感激您的信任並期待未來的稅季能繼續幫您服務！

進入網站確認您的聯邦退稅：

[www.irs.gov](http://www.irs.gov) 然後點擊連結“where is my refund?” 或撥打 (800) 829-1954.

確認您的社會安全碼、申請狀態及實際的退稅總額。您可以在退稅單複本上找到這些資訊。

進入網站確認您的州退稅：

[www.ftb.ca.gov](http://www.ftb.ca.gov) 然後點擊連結“where’s my refund?” 或撥打 (800) 852-5711