

Free Tax Prep Intake Sheet

Taxpayer Name	Date
County:	School District:
1. Was your federal adjusted gross income plus NY additions more than \$4,000 (\$3,100 if you're single or a dependent)?	Yes No
2. Was your only source of income Social Security benefits?	Yes No
3. Did you buy items or services for use in NY without paying NY state sales or use tax on those items? (Line 59 on the IT201, Line 56 on the IT203)	Yes No
4. Do you keep records of all your income, expenses and deductions?	Yes No
5. Were you a NY state resident the entire tax year? If married, was your spouse? (If No, goto 9)	Yes No
6. Did you pay child support through the NYS support collection unit at least ½ of the year? [IT209]	Yes No
7. Were you an active volunteer firefighter or ambulance worker the whole year? If married, was your spouse? [IT245]	Yes No
8. Was your total household income (everyone living with you) under \$18,000? [IT214]	Yes No
9. Did you pay undergraduate tuition by cash, check, credit card or borrowed funds for yourself, your spouse or your dependents not including scholarships and grants? [IT272 or IT203B]	Yes No
10. Did you pay nursing home expenses (special assessment) during the tax year? [IT258]	Yes No
11. Did you pay long-term care insurance (for nursing home expenses) during the tax year? [IT249]	Yes No
12. Did you pay tax to another state or local government [IT112R] or pay tax to Canada [IT112C]?	Yes No
13. Did you use biofuel (special heating oil) to heat your home? [IT241]	Yes No
14. Did you buy or lease solar energy system equipment & install it at your principal home during the tax year? [IT255]	Yes No
15. Did you pay into the NYS retirement system (414H) or NYC flex benefits program (IRC 125) during the tax year?	Yes No
16. Did you contribute to a NYS 529 College Savings Plan during the tax year?	Yes No
17. Did you receive interest on US government bonds during the tax year?	Yes No
18. Did you receive a pension from NY, local gov't, or federal gov't pension plan? If married, did your spouse?	Yes No
19. Did you receive a pension NOT from a government? If married, did your spouse?	Yes No
20. If you answered YES to #19, was the person who received the pension 59 ½ or older?	Yes No
21. Did you receive pension payments as a beneficiary of a plan?	Yes No
22. If you answered YES to 21, what share did you receive?	Yes No
23. Did you receive disability income during the tax year? [IT221]	Yes No

If you would like direct deposit, please provide bank information

Name of bank or routing number	Account number	Savings	Checking
Email address:			
For drop off returns only:			School District:
TXPYR ID type & #:		SPSE ID type & #	
Social Security Verified			
TXPYR form or #	SPSE form or #	Dependent #1	
Dependent #2	Dependent #3	Dependent #4	

This program is made possible by grants. Please take a few minutes to help us qualify for future grants by answering the following optional questions. Your responses will remain confidential.

Have you had a bank account in the last 12 months?	Yes	No		
Before you came in today, were you a current member of Alternatives Credit Union, the funders of this program?	Yes	No		
Where did you file last year?	Here at Cortland VITA	Other free service	Self Prepared	
	Did not file	Paid preparer _____	cost me \$_____.	
How did you hear about us?	Family or friend	Non-profit referral	Newspaper	
	Advertisement	Radio/TV	Flyer	
	Internet	Sign	Coming so long IDK	
Choose one:	Female	Male	Filing Jointly	Other
Are you a member of the United Auto Workers?	Yes	No		
Did you receive any public benefits (Food stamps, HEAP, Child or Family Health Plus, Medicaid, Section 8 or housing Subsidy) in 2017?	Yes	No		
	No but would like to	No not interested		
Where do you live?	Cortland	Tully	Truxton	McGraw
	Cincinnati	Homer	Marathon	Preble
	Virgil	Willet	Cuyler	Blodgett Mills
	Harford	Freetown	Lapeer	Scott
Are you planning on saving any of your tax refund?	Yes, for 6 mos or more	Yes, but spend in 6 mos		
	No	I don't expect a refund		
If you set aside money, where are you mainly saving?	Savings Account	Savings Bond	Lucky Savers	
	Checking Account	Prepaid Card	As Cash	
	Retirement Account	Other		
In a typical month, what best describes your experience with credit cards?	Pay in full	Carry a balance	Make min payment	
	Late payments	Miss payments	No credit card	
If you had an emergency expense that costs \$400 how would you pay for it?	Plastic & Pay right away	Plastic & pay over time		
	Pay from bank account	Pay with bank loan		
	Borrow from friend/family	Use payday loan/overdraft		
	Sell something	Can't do it		