Form **13614-C** (Rev. 10-2012)

## Department of the Treasury - Internal Revenue Service

Intake/Interview & Quality Review Sheet

OMB # 1545-1964

## Section A. Complete Pages 1-3

You are responsible for the information on your return so please provide complete and accurate information to the IRS certified volunteer preparer. If you have any questions please ask your preparer.

## You will need your:

- Tax information such as Forms W-2, 1099, 1098.
- Social security cards or ITIN letters for you and all persons on your tax return.
- Picture ID (such as a valid driver's license or other government issued ID for you and your spouse, if applicable).

Part I. Your Personal Infor	mation											
Your First Name	M. I.	. Last Name				Are you a U.S. Citizen? Yes No						
2. Your Spouse's First Name	M. I.	Last Name				Is your spouse a U.S. Citizen?  Yes No						
3. Mailing Address	Ap	# City			State	zip Code						
4. Contact Information Phone:	Cell Phone:			E-mail:								
5. Your Date of Birth	6. Your Job Tit	ile		Are you: 7. Legally Blind Yes No 8. Totally and Permanently Disabled Yes No								
9. Your Spouse's Date of Birth	. Your Spouse's Date of Birth 10. Your Spouse's Job Title				Is Your Spouse: 11. Legally Blind Yes No 12. Totally and Permanently Disabled Yes No							
13. Can anyone claim you or your spouse on their tax return? Yes No Unsure												
Part II. Marital Status and	d Household	Inform	nation									
Single Married: Did you live with Divorced or Legally Separ Widowed: Year of spouse  2. List names below of everyone your home that you supported to	ated: Date of final 's death: who lived in your	decree o	or separate	maintenance	e agreement: _				tside of			
Name (first, last) Do not enter your name or spouse's name below.  (a)	Date of Birth (mm/dd/yy) (b)	Relation (e.g. o	ship to you laughter, ther, sister, one) (c)	Number of months lived in your home in 2012 (d)	US Citizen or resident of US, Canada or Mexico in 2012 (yes/no) (e)	Mai Sta as	rital tus of 1/12 M)	Full- time Student in 2012 (yes/no) (g)	Received less than \$3800 income in 2012 (yes/no) (h)			
To check the	status of your	REFLIN	JD visit '	'Where's	My Refund?	2" on v	MANAY ii	rs gov				

To check the status of your REFUND visit "Where's My Refund?" on www.irs.gov or call 1-800-829-1954 for assistance.

Volunteers assisting with preparing your return are trained to provide high quality service and uphold the highest ethical standards.

To report unethical behavior to IRS, email us at wi.voltax@irs.gov or call toll free 1-877-330-1205.

Sect	ion A	\. Pleas	e complete – check Yes, No or Unsure to all questions below. Please ask if you need help.			
Par	Part III. Income – In 2012, did you (or your spouse) receive:					
Yes	No	Unsure				
		<u> </u>	Wages or Salary? (Form W-2) If yes, how many jobs did you have in 2012?			
		2.	Tip Income?			
		3.	Scholarships? (Forms W-2, 1098-T)			
$\Box$			Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)			
			Refund of state/local income taxes? (Form 1099-G)			
		_	Alimony Income?			
			Self-Employment Income? (Form 1099-MISC)			
		=				
			Cash/check payments for any work performed not reported on Forms W-2 or 1099?			
			Income (or loss) from the sale of Stocks, Bonds or Real Estate (including your home)? (Forms 1099-S, 1099-B)			
			Disability Income (such as payments from insurance, or workers compensation)? (Forms 1099-R, W-2)			
			Distributions from Pensions, Annuities, and/or IRA? (Form 1099-R)			
			Unemployment Compensation? (Form 1099-G)			
		13.	Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)			
		14.	Income (or loss) from Rental Property?			
		<u> </u>	Other Income: (gambling, lottery, prizes, awards, jury duty, etc.)? (Forms W-2 G, 1099-MISC) Specify:			
	4 1\/					
			nses – In 2012 Did you (or your spouse) pay:			
Yes	No	Unsur				
			Alimony: If yes, do you have the recipient's SSN? Yes No			
			Contributions to a retirement account?			
			Educational expenses for yourself, spouse or dependents, such as tuitions, books, fees, etc.? (Form 1098-T) Unreimbursed employee business expenses (such as uniforms or mileage)?			
			Medical expenses (including health insurance premiums)?			
			Home mortgage interest? (Form 1098)			
			Real estate taxes for your home or personal property taxes for your vehicle? (Form 1098)			
			Charitable contributions?			
			Child or dependent care expenses such as day-care?			
			For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.?			
— Dar	+ \/	L ifa Ev	vents – In 2012 Did you (or your spouse):			
	No	Unsur	· · · · · ·			
Tes			Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in Box 12)			
			Have debt from a mortgage or credit card canceled/forgiven by a commercial lender? (Forms 1099-C, 1099A)			
			Buy, sell or have a foreclosure of your home? (Form 1099-A)			
			Have Earned Income Credit (EIC) disallowed in a prior year? If yes, for which tax year?			
			Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)			
			Live in an area that was affected by a natural disaster? If yes, where?			
			Receive the First Time Homebuyers Credit in 2008?			
			Pay any student loan interest? (Form 1098-E)			
			Make estimated tax payments or apply last year's refund to your 2012 tax? If so how much?			
			Attend school as a full time student? (Form 1098-T)			
			Adopt a child?			
			File a 2011 federal tax return containing a "capital loss carryover" on Form 1040 Schedule D?			
			Become a victim of identity theft?			
∟ Pres	 sident		on Campaign Fund: (If you check a box, your tax or refund will not change.)			
			or your spouse if filing jointly, want \$3 to go to this fund			

# Additional Information and Questions related to the preparation of your return

Many free tax preparation sites operate by receiving grant money. The data from the following questions may be used by this site to apply for these grants. Your answers will be used only for statistical purposes.  Other than English what language is spoken in the home?								
Are you or a member of your household considered disabled?								
If you are due a refund or have a balance due:								
<ul> <li>Ask your preparer about Direct Deposit. It is the fastest, safest way to receive your tax refund. When you combine e-file and direct deposit, the IRS will likely issue your refund in as few as 10 days.</li> </ul>								
<ul> <li>Ask your preparer about purchasing Series I U.S. Savings Bonds with part or all of your tax refund. Savings bonds are a safe and secure way to invest in the future. Purchase I Bonds for yourself or others in multiples of \$50 and earn interest for up to 30 years.</li> </ul>								
If you are due a refund, would you like a direct deposit?  If you are due a refund, would you like information on how to purchase U.S. Savings Bonds?  If you are due a refund, would you like information on how to split your refund between accounts?  Yes No  If you have a balance due, would you like to make a payment directly from your bank account?  Yes No								
Additional comments:								
Under no circumstances will the Internal Revenue Service tolerate discriminatory treatment of taxpayers by its employees, or individuals who volunteer or work at Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) sites. No taxpayer shall be subject to discrimination on the basis of sex, race, color, national origin, reprisal, disability or age in educational programs or activities supported by the Department of the Treasury – Internal Revenue Service.								
Taxpayers with a disability may require a reasonable accommodation in order to participate or receive the benefits of a program or activity supported by the Department of the Treasury – Internal Revenue Service. Site Coordinators and Managers are responsible for ensuring that requests for reasonable accommodation are granted when the request is								

made by a qualified individual with a disability.

If a qualified taxpayer believes that he or she has been discriminated against based on sex, race, color, national origin, disability, reprisal or age, they can file a complaint with the Department of the Treasury - Internal Revenue Service. All written complaints should be sent to:

Director, Civil Rights Division Internal Revenue Service 1111 Constitution Avenue, NW, Rm. 2413 Washington, DC 20224

For all inquiries concerning taxpayer civil rights, contact us at the address referenced above, or e-mail us at eeo.external.civil.rights@irs.gov.

#### STOP HERE!

Thank you for completing this form.

## **Paperwork Reduction Act Notice**

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224

## **Section B. For Certified Volunteer Preparer Completion**

**Remember:** You are the link between the taxpayer's information and a correct tax return! Verify the taxpayer's information on pages 1, 2 & 3 is complete. All questions must be discussed with the taxpayer and all "Unsure" responses should be changed to "Yes" or "No".

1. The certification levels of this tax return and volunteer preparer were Must be completed by Certified Volunteer only if persons are listed verified. in Part II Question 2 2. All unsure boxes were discussed Check if persons are listed in Part II Question 2 with the taxpayer and correctly marked yes or no. Yes No 1. Can anyone else claim any of the persons listed in Part II, question 2, as a dependent on their return? If yes, which 3. The **information** on pages one and ones: two was correctly addressed and transferred to the return. 4. Taxpayer's **identity** has been verified and address and phone numbers are Yes No 2. Were any of the persons listed in Part II, question 2, totally 5. Names, SSNs, ITINs, and EINs, were and permanently disabled? If yes, which ones: verified and correctly transferred to the return. 6. Filing status was verified and correct. 7. Personal and Dependency **Exemptions** are entered correctly on Yes No 3. Did any of the persons listed in Part II, question 2 provide the return. more than 50% of their own support? If yes, which ones: 8. All **Income** (including income with or without source documents) checked "yes" in section A, part III was correctly transferred to the tax return. Yes No 4. Did the taxpayer provide more than half the support for 9. Adjustments to Income are correctly any of the persons listed in Part II, question 2? If yes, reported. N/A which ones: 10. Standard, Additional or Itemized deductions are correct. 11. All **credits** are correctly reported. 12. Withholding shown on Forms W-2, 1099 and Estimated Tax Payments Yes No 5. Did the taxpayer pay over half the cost of maintaining a are correctly reported. home for any of the persons in Part II, question 2? If yes, ☐ N/A which ones: 13. **Direct Deposit/Debit** and checking/ saving account numbers are correct. 14. The correct SIDN is shown on the 15. The taxpayer(s) was advised that they Reminders are **responsible** for the information on Use Publication 4012, Volunteer Resource Guide and Publication 17, their return. Your Federal Income Tax in making tax law determinations. **Additional Tax Preparer Notes:** 

Section C. Certified Volunteer Quality Reviewer Section

Review the tax return to ensure the

following actions have been taken.