Form **13614** (Rev. August 2007)	Department of the Treasury **– Internal Revenue Service** **Intake and Interview Sheet**	OMB # 1545-1964

You (and Spouse) will need:

- *Proof of Identity*
- *Copies of ALL W-2, 1098, 1099 forms*
- *Social Security (SSN) or Individual Tax Identification Number (ITIN) for all Individuals to be listed on the return*
- *Child care provider's identification number*
- *Banking information (checking and/or savings account) for direct deposit/debit*
- *Amounts/dates of estimated or other tax payments made, etc.*
- *Amounts of other income*

Part I: Taxpayer Information

1. Your First Name	M.I.	Last Name		2. SSN or ITIN

3. Date of Birth (mm/dd/yyyy)	4. US Citizen or Resident Alien ☐ Yes ☐ No	5. Legally Blind ☐ Yes ☐ No	6. Totally and Permanently Disabled ☐ Yes ☐ No

7. Spouse's First Name	M.I.	Last Name		8. SSN or ITIN

9. Date of Birth (mm/dd/yyyy)	10. US Citizen or Resident Alien ☐ Yes ☐ No	11. Legally Blind ☐ Yes ☐ No	12. Totally and Permanently Disabled ☐ Yes ☐ No

13. Address	Apt #	City	State	Zip Code

14. Phone Number and e-mail address Phone: ( ) e-mail:	15. Can you or your spouse be claimed as a dependent on the income tax return of any other person for 2007? ☐ Yes ☐ No

16. **On December 31, 2007:**

   a. Were you: ☐ Single ☐ Legally Married ☐ Separated ☐ Divorced ☐ Widowed

   b. If married, were you living together (with your husband/wife) **on/after June 30, 2007?** ☐ Yes ☐ No

   c. Was your spouse deceased? If yes, provide the date of death. _____ (mm/dd/yyyy)

17. Did you pay more than half the cost of keeping up the home for the year? ☐ Yes ☐ No

Part II. Family and Dependent Information – Do not include you or your spouse.

Print the name of everyone who lived in your home and outside your home that you supported during the year.

Name (first, last) (a)	Date of Birth mm/dd/yyyy (b)	Social Security Number or ITIN (c)	Relationship to you (son, daughter, etc.) (d)	Number of months person lived with you in 2007 (e)	US Citizen, Resident of US, Canada or Mexico (yes or no) (f)	Is the dependent a full time student born before 1989? (yes or no) (g)

Paperwork Reduction Act Notice

Catalog Number 38836A   Form **13614** (Rev. 8-2007)

Page 2 TO BE COMPLETED WITH CERTIFIED VOLUNTEER

Use the decision trees in Publication 4012,
Volunteer Resource Guide while discussing the questions below with the taxpayer.

Part III. Filing Status & Dependency Determination

Based on the interview, the filing status of the taxpayer is: ☐ Single   ☐ MFJ   ☐ MFS*   ☐ HOH   ☐ QW

*Spouse Name _____   Social Security Number _____

☐ Yes   ☐ No   1. Did you provide more than 50% of the support for the dependents claimed?
☐ Yes   ☐ No   2. Can anyone else claim any of these dependents on their income tax return?
☐ Yes   ☐ No   3. Were any of these dependents permanently and totally disabled in 2007?
☐ Yes   ☐ No   4. Did any of these dependents file a joint return for 2007?
_____   5. Based on the interview, how many individuals qualify as dependents for this return?

COMMONLY USED INCOME AND EXPENSES

Part IV. Income – **In 2007, did you (or your spouse) receive:**

☐ Yes   ☐ No   1. Wages or Salary (include W-2s for all jobs worked during the year)
☐ Yes   ☐ No   2. Disability income
☐ Yes   ☐ No   3. Interest/Dividends from: checking or savings account, bonds, CDs, or brokerage account
☐ Yes   ☐ No   4. State tax refund (may be taxable if you itemized last year)
☐ Yes   ☐ No   5. Alimony income
☐ Yes   ☐ No   6. Tip income
☐ Yes   ☐ No   7. Pension and/or IRA distribution
☐ Yes   ☐ No   8. Unemployment (1099-G)
☐ Yes   ☐ No   9. Social Security or Railroad Retirement Benefits (1099-SSA or RRB)
☐ Yes   ☐ No   10. Self Employment Income - business, farm, hobby **(1099-Misc or any earned income not reported on W-2)**
☐ Yes   ☐ No   11. Other Income such as gambling winnings, awards, prizes and Jury Duty pay, etc.

Part V. Adjustments – **In 2007 did you (or your spouse) make:**

☐ Yes   ☐ No   1. Contributions to IRA, 401k or other retirement account
☐ Yes   ☐ No   2. Alimony payments (if yes, you must provide the name and SSN of the recipient)
☐ Yes   ☐ No   3. Education related expenses

Part VI. Itemized Deductions – **Did you (or your spouse) have 2007 expenses for:**

☐ Yes   ☐ No   1. Un-reimbursed medical expenses
☐ Yes   ☐ No   2. Home mortgage payments (interest and taxes – see Form 1098)
☐ Yes   ☐ No   3. Charitable contributions

Part VII. Credits – **In 2007 did you (or your spouse) have:**

☐ Yes   ☐ No   1. Child/dependent care expenses that allow you (and your spouse-if MFJ) to work
☐ Yes   ☐ No   2. Educational expenses for you (or your spouse) and/or your dependents
☐ Yes   ☐ No   3. Retirement Contribution to a traditional IRA, Roth IRA or 401k as shown on Form W-2

Part VIII. Earned Income Tax Credit Determination – **EITC Eligibility**

☐ Yes   ☐ No   1. Was EITC previously disallowed? (if yes, taxpayer may not be eligible for EITC)
☐ Yes   ☐ No   2. Based on the interview, is the taxpayer qualified for EITC?