

Indiana Intake/Interview & Quality Review Sheet

All questions apply to Tax Year 2018

Taxpayer Last Name _____

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| 1. Did you file form SC-40 to get your Unified Tax Credit for the Elderly already?
If you said Yes, STOP – you cannot file another Indiana tax return for last year. | Yes ___ No ___ |
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Residency Information

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| 2. Were you a full-year resident of Indiana during last year? | Yes ___ No ___ |
| 3. On January 1 of last year : | Taxpayer Spouse |
| a. In what Indiana county did you live? | _____ |
| b. In what Indiana county did you work (if any)? | _____ |

Indiana Deduction and Credit Information

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| 4. Did you pay rent for your home? | Yes ___ No ___ |
| 5. Did you pay property tax for your home? | Yes ___ No ___ |
| 6. Did you receive military, military reserve or National Guard pay or other benefits?
If you answered yes, did you serve on active duty? | Yes ___ No ___
Yes ___ No ___ |
| 7. Did you pay taxes to any entity outside Indiana (other than the U.S. IRS)? | Yes ___ No ___ |
| 8. Did you receive prize money from the Hoosier Lottery? | Yes ___ No ___ |
| 9. Did you pay premiums for a Long-Term Care policy? | Yes ___ No ___ |
| 10. Did you have a child attend a nonpublic school (including a private school, a parochial school or a homeschool) in Indiana? | Yes ___ No ___ |
| 11. Did you donate money or property to an Indiana college? | Yes ___ No ___ |
| 12. Did you donate to any other scholarship granting organization? | Yes ___ No ___ |
| 13. Did you contribute to Indiana's College Choice 529 Plan? | Yes ___ No ___ |

Payment and Refund Information

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| 15. Did you make quarterly Indiana estimated tax payments? | Yes ___ No ___ |
| 16. Would you like your refund direct deposited? | Yes ___ No ___ |