

2018 Kansas Tax-Aide Intake Sheet

Taxpayer Name: _____ **Date:** _____

1. What dates did you and your spouse, if applicable, live in Kansas last year?

From _____ To _____

2. What is your Kansas county? _____

3. What is your Kansas School District? _____

4. Did your name or address change since your 2017 filing? Yes No

5. Were you or your spouse totally and permanently disabled or blind all 2018, regardless of age?

Yes No

6. Did you make any Estimated Tax Payments to the Kansas Dept. of Revenue? Yes No

If YES, what date(s)? _____ what amount(s)? _____

7. What is your Kansas source income? _____

8. What is your Federal AGI? _____

9. Did you receive both Social Security and Railroad Retirement? Yes No

Additions to Kansas Income

Did you have Kansas or municipal interest income not taxed on your Federal return? Yes No

If yes, how much exempt interest was from Kansas bonds? _____

Did you make contributions to the Kansas Public Retirements System? Yes No

Subtractions from Kansas Income

Was a Kansas refund included in your federal adjusted gross income? Yes No

Did you have Kansas qualified exempt retirement benefits? Yes No

See page 2 for list of qualified benefits

Did you contribute to a 529 account? Yes No

Homestead Refund/Property Tax Relief Claim for Full-Year Kansas Residents

Were you a homeowner who qualifies for the Homestead Refund or Property Tax Relief Claim?

See page 2 for qualifications

Kansas Qualified Exempt Retirement Benefits

- Federal Civil Service Retirement or Disability Fund payments and any other amounts received as retirement benefits from employment by the federal government or for service in the United States Armed Forces
- Retirement plans administered by the U.S. Railroad Retirement Board, including U.S. Railroad Retirement Benefits, tier I, tier II, dual vested benefits, and supplemental annuities
- Kansas Public Employees' Retirement (KPERs) annuities
- Kansas Police and Firemen's Retirement System pensions
- Distributions from Police and Fire Department retirement plans for the city of Overland Park, Kansas
- Kansas Teachers' Retirement annuities
- Kansas Highway Patrol pensions
- Kansas Justices and Judges Retirement System annuities
- Board of Public Utilities pensions
- Income from retirement annuity contracts purchased for faculty and others employed by the State Board of Regents or by educational institutions under its management with either their direct contributions or through salary reduction plans
- Amounts received by retired employees of Washburn University as retirement and pension benefits under the university's retirement plan
- Certain pensions received from Kansas first class cities that are not covered by KPERs

Homestead Refund and Property Tax Relief Claim Qualifications:

A homestead claim (K-40H) is for homeowners who own and occupy their homestead and were residents of Kansas all of 2018. This refund program is not available to renters. As an owner your name is on the deed for the homestead. As a resident the entire year and a homeowner, you are eligible if your total household income is \$35,000 or less and you: 1) were born before January 1, 1963, or 2) were blind or totally and permanently disabled all of 2018, or 3) have a dependent child who lived with you the entire year who was born before January 1, 2018, and was under the age of 18 all of 2018. A person owning a homestead with an appraised valuation for property tax purposes that exceeds \$350,000 does NOT qualify for a homestead refund.

The property tax relief claim (K-40PT) is for homeowners that were 65 years of age or older, with a household income of \$19,800 or less, and a resident of Kansas all of 2018. Only one refund claim (K-40H or K-40PT) may be filed for each household. A married couple OR two or more individuals who together occupy the same household may only file one claim. A married couple who own and occupy separate households may file separate claims and include only their individual income. If you owe any delinquent property taxes on your home your homestead refund will be used to pay those delinquent taxes. The Kansas Department of Revenue will send your entire refund to the County Treasurer. If you moved during 2018, you may claim the general property tax paid for the period of time you lived in each residence. Homeowners who rent out part of their homestead or use a portion of it for business may claim only the general property tax paid for the part in which they live.