

Arizona Supplemental Tax Intake & Interview (Check all that apply).

Part I. Dependents – Did you or your spouse:

_____ Pay more than 25% AND at least \$800 of the cost to maintain a person 65 of age or older in an ARIZONA residential care facility? (Need not be a relative)

_____ Pay for more than \$800 for ARIZONA home health care or other medical costs for a person 65 of age or older? (Related or not)

_____ Have a stillborn child? Certificate Number required for this dependent addition

Part II. Qualifying Ancestors – Did you or your spouse:

Have an Ancestor (parent, grandparent, or great-grandparent) 65 year of age or older living in your principal residence for the entire tax year? If so,

_____ Did you pay for more than one-half the support and maintenance costs for this ancestor?

_____ Did this person require help with activities such as walking, bathing, dressing, eating, getting out of bed/chairs/cars, cooking, brushing teeth, etc.

Part III. Miscellaneous

_____ Are you and/or your spouse retired Federal or AZ government (state, city, local) employees?

_____ Did you or your spouse receive active-duty military or reservist pay during this tax year?

_____ Are you or your spouse a Native American and did you or your spouse live and work on a reservation, established for your tribe, for the entire year?

_____ Did you sell any investments for a gain this year which you acquired after 1/1/2012?

_____ Did you receive any non-Arizona Municipal interest this year?

_____ This year, did you report a Federal Capital Loss Carry Forward from a non-Arizona source while you a non-resident of Arizona?

_____ Did you make contributions to a 529 College Savings Plan this year?

_____ Did you pay Long Term Care insurance premiums this year and are not itemizing?

Part IV. Property Tax Credit

_____ Do you have an Individual Taxpayer Identification Number? (ITIN holders are not eligible for any ARIZONA credits)

_____ Were you an AZ resident(s) ALL year and 65 years of age or older OR on SSI Title 16?

_____ Was your Income below \$3,751 (living alone) or \$5,501 (more than one). **NOTE** 1099-SSA, RRB and disability benefits are not counted toward these income limits

_____ Did you pay property taxes or rent?

_____ If you do not live alone, do other members of your household have income?

Part IV. Tax Credits – Check all that apply:

Did you or your spouse make any CASH contributions or pay fees (excluding tuition) to an:

_____ AZ Qualified Charitable Organization or have a carryover from a prior year (Forms 301/321)

_____ AZ Public School or have a carryover from a prior year (Forms 301/322).

_____ AZ Private School Tuition Organization or have a carryover from a prior year (Forms 301/323).

_____ AZ Certified School Tuition Organization or have a carryover from a prior year (Forms 301/348).

_____ AZ Qualifying Foster Care Organization or have a carryover from a prior year (Forms 301/352).

_____ AZ Military Family Relief Fund or have a carryover from a prior year (Forms 301/340).

_____ Did you or your spouse pay income taxes to another state or country during this tax year?

If so, what State or Country? _____ (Forms 301/309)

_____ Were you sentenced to at least 60 days in a county, state or federal prison? If so, you are not eligible for the excise tax credit.

NOTE: Contributions made between Jan. 1 and Apr. 18, 2023 may be used for either TY2022 or TY2023.