

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 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, grandparent, grandparent, or great-grandparent) 65 years of age or older living in your principal residence for the entire tax year? If so, --
- Did you pay more than one-half the support and maintenance costs for this ancestor? Dependent or not.
- Did this person require help with at least two 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, county, 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?
- Did you report a Federal Capital Loss Carry Forward from a non-Arizona source while a non-resident of Arizona?
- Did you make contributions to an AZ 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 AZ credits)
- Were you an AZ resident(s) ALL year and 65 years of age or older OR on SSI Title 16?
- Was your Household Income below **\$3,751** (living alone) or **\$5,501** (more than one).
- (NOTE: 1099-SSA, RRB, AZ unemployment and disability benefits are not counted toward these income limits)**
- Did you pay property taxes or rent?
- If you do not live alone, did anyone who lived with you have income? (How much income?)

Part V. Tax Credits – Did you or your spouse make any CASH contributions or pay fees (excluding tuition) to:

- 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 (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 yes, not eligible.

NOTE: Some contributions made between Jan. 1 and Apr. 15, 2026, may be used in either TY25 or TY26.