Form **13614** (Rev. 12-2005)

INTERVIEW AND INTAKE SHEET

OMB # 1545-1432

Instructions: This form will be used by screeners, preparers, or others involved in the return preparation process. Please complete all information. The partner or site may request additional information. The service statement and request for the taxpayer's signature(s) on page 2 must be included on partner in-take forms used in lieu of this IRS Form 13614.

You will need:

- ☐ Valid Picture I.D.
- ☐ Copies of ALL W-2, 1098, 1099 Forms and the amount of other income received by you and your spouse
- ☐ Tax Identification Number (TIN) for you, your spouse and any others shown on the tax return
- ☐ Provider's address and Tax Identification Number for Child/Dependent Care Credit
- ☐ Form 8332 or copy of divorce decree for non-custodial parent claiming child
- ☐ Proof of Account Number and Routing Transit Number of the financial institution for direct deposit into a savings or checking account
- ☐ Copy of prior year's tax return, **if available**

Your First Name	M.I.	Last Name	
Spouse's First Name	M.I.	Spouse's Last Name, if different	
Address	City	State	Zip Code
Telephone Number: Daytime	Evening	Cell	
Your Date of Birth (mm/dd/yyyy) / /	Spouse's Date of Birth (mm/dd/yyyy) / /		

Critical Data

Check if U.S. Citizen or resident alien all year: ☐ Taxpayer ☐ Spouse	Check if lived in U.S. for more than 6 months: ☐ Taxpayer ☐ Spouse
Check if Legally Blind: ☐ Taxpayer ☐ Spouse	Check if Permanently Disabled: ☐ Taxpayer ☐ Spouse

As of December 31st were you: ☐ Single ☐ Legally Married ☐ Separated ☐ Divorced

If married, were you living with your spouse at anytime during the last 6 months of the year? ☐ Yes ☐ No ☐ N/A

Is your spouse deceased? ☐ Yes ☐ No | If yes, date spouse died (mm/dd/yyyy) / /

Can your parents or someone else claim you or your spouse as a dependent on their tax return? ☐ Yes ☐ No

Did you provide more than half the cost of keeping up a home for the year? ☐ Yes ☐ No

Has the Earned Income Credit been disallowed by IRS? ☐ Yes ☐ No

Family and Dependent Information

List everyone who lived in your home and anyone living outside your home that you or your spouse supported during the tax year. For example: Son, daughter, stepchild, foster child, brother, sister, stepbrother, stepsister, or a descendant of any of them, also mother or father. **Do not include yourself or your spouse.**

First Name	Last Name	Date of Birth (mm/dd/yyyy)	Relationship to you	Months in home, *see Special Rules below	US Citizen, Resident of US, Canada or Mexico	Did person file joint return?	Is child a full-time student or permanently and totally disabled?	Did child provide more than 50% of their own support?	Did you provide more than 50% of their support?	Did the person have Gross Income of $3200 or more?	Is person qualifying child of another person?

***Special Rules** for parents who are divorced or legally separated or lived apart at all times during the last 6 months of the year. If the child lived in your home for less than half of the calendar year:

- Did one or both parents provide over half of the child's total support? ☐ Yes ☐ No
- Is the child in custody of one or both parents for more than half of the year? ☐ Yes ☐ No
- Did the custodial parent sign the Form 8332 or similar statement releasing the exemption? ☐ Yes ☐ No