

Department of the Treasury – Internal Revenue Service
**Volunteer Return Preparation Program Hurricanes
Katrina, Rita and Wilma Intake/Interview Sheet**

Part I All Taxpayers Assisted

Instructions: This section will capture data to properly determine if an individual qualifies for any Hurricane Katrina, Rita or Wilma tax benefits. It should be used by screeners, preparers, or others involved in the Volunteer Return Preparation Program (VRPP) for all taxpayers assisted. Use with Form 13614, Interview and Intake Sheet.

1. HOUSING DISPLACED INDIVIDUALS		YES	NO	N/A	COMMENTS
1A	Did you house a Katrina displaced individual in your home in 2005? If yes, enter number of days in comments.				
1B	Was the displaced individual your dependent or spouse?				
2. GIFTS TO CHARITY					
2A	Did you make any cash charitable contributions between August 28, 2005 and December 31, 2005?				
2B	Do you have Katrina related charitable mileage?				
2C	If yes, do you have written records?				
3. HOPE AND LIFETIME LEARNING CREDIT					
3A	Were you, your spouse, or your dependent enrolled and paying tuition at an eligible educational institution located in the Gulf Opportunity Zone?				
4. HURRICANE KATRINA, RITA, OR WILMA IMPACTED					
4A	Were you impacted by Hurricanes Katrina, Rita or Wilma? (If yes , complete Part II of this form. If no , the form is complete.)				

Part II Hurricanes Katrina, Rita, and Wilma Impacted Individuals Only

Instructions: This section is designed to capture critical data to properly prepare tax returns for Hurricane Katrina, Rita, or Wilma impacted individuals only. It should be used by screeners, preparers, or others involved in the return preparation process to quickly determine if a volunteer can assist the taxpayer or needs to refer them to a Taxpayer Assistance Center (TAC), paid professional preparer, or other organizations, if available, trained to prepare casualty loss tax returns. If the taxpayer is referred for assistance, Form 13614K should be returned to the taxpayer.

1. CORE DISASTER AREA					
1A	What State?				
1B	What County/Parish?				
2. RECORDS/INCOME		YES	NO	N/A	COMMENTS
2A	Do you have a copy of your 2004 Federal Income Tax Return?				
2B	Do you have your 2005 income and expenses? i.e., W-2, 1099, 1098				
<i>(If no to Q, 2A or 2B, see Tax Record Reconstruction on reverse.)</i>					
3. EARNED INCOME CREDIT AND ADDITIONAL CHILD TAX CREDIT					
3A	Was your 2004 earned income greater than your 2005 earned income?				
4. RETIREMENT PLAN WITHDRAWALS					
4A	Did you receive a distribution from a qualified retirement plan, tax sheltered annuity or IRA in 2005?				
5. PROPERTY					
5A	Did you experience a loss of personal or real property?				
5B	Did you receive any reimbursements?				
5C	Was the reimbursement greater than the property value? <i>(If yes, the VRPP site may be able to prepare the tax return.)</i> <i>(If no, give the taxpayer this intake sheet and refer them to the Casualty Loss Information on reverse.)</i>				

CASUALTY LOSS

Volunteers are not trained to prepare Casualty Loss Tax Returns

If you are able to provide any of the following information, it will assist the referred preparer in calculating your casualty loss: (Publication 2194, Disaster Losses Kit for Individuals, will assist you in compiling these items.)

- Complete list of personal and non-real estate items lost in the disaster.
- Copies of your Federal tax returns for the last three years, if available.
- If you claimed a casualty loss on your last year's return or any prior year return, a copy of the amended returns or any other documentation, if available.
- Insurance reimbursement documentation, if applicable.
- All types of Federal Emergency Management Agency's (FEMA) reimbursement documentation, if applicable.
- The fair market value of your home, real estate and other personal property before the casualty.
- Any contractor estimates and repairs or replacement costs to damaged property.

If you previously elected the standard deduction and will now be using a Schedule A to itemize your deductions to claim a casualty loss, you will also need copies of your prior state tax withholdings, real and personal property taxes, home mortgage interest and charitable contributions.

TAX RECORD RECONSTRUCTION

If you do not have a W-2 from each of your employers do the following:

1. Contact your employer for the W-2.
2. If you were unable to contact your employer you should complete a Form 4852, substitute W-2. **Katrina, Rita, or Wilma impacted individuals are not required to wait until February 15th.** You will need the following:
 - a. Your employer's name and complete address, including zip code, employer identification number (if known - see prior year's Form W-2 if you worked for the same employer), and telephone number,
 - b. Your name, address, including zip code, social security number, and telephone number; and
 - c. An estimate of the wages you earned, the federal income tax withheld, and the period you worked for that employer. The estimate should be based on year-to-date information from your final pay stub or leave-and-earnings statement, if available.
3. For a Form 4852, Substitute W-2, call 1-866-562-5227 or visit www.irs.gov.

If you need information from your Prior Federal Tax Return:

1. Hurricane Katrina displaced individuals may call 1-866-562-5227 to receive a **transcript** of their tax year 2004 Tax Return via fax. You must remain on the line while the fax is being sent and be in the same location as the fax machine.
 - a. For proper identification you will be required to give your name, filing status, social security number, address and two random answers concerning your status.
 - b. If you are not where the fax machine is located, a transcript of your tax return can be mailed to you if you provide your current address.
 - c. If unable to get a transcript by phone, you can file Form 4506 -T, Request for Transcript of Tax Return, to request transcript of your previous year's tax return. Write "**Hurricane Katrina, Rita, or Wilma**" in red letters across the top of the form to expedite processing.
2. **OR**, File Form 4506, Request for Copy of Tax Return, for an actual copy of return filed. Write "**Hurricane Katrina, Rita, or Wilma**" in red letters across the top of the form to expedite processing. The normal processing fee will be waived.

An alternative to options 1 and 2 above: You may go to the closest IRS Tax Assistance Center to receive a transcript of your prior year tax return and income information.

For IRS Taxpayer Assistance Center locations: Toll-Free 1-866-562-5227
Web page – www.irs.gov/localcontacts/index.html

For assistance with Reconstructing Bank Records:

Mississippi Department of Banking:

Toll-Free Nationwide 1-800-844-2499
Web Page – www.dbof.state.ms.us

Louisiana Office of Financial Institutions:
Toll-Free Nationwide 1-866-783-5530 or In-State
1- 866-525-9414

Web Page – www.ofi.louisiana.gov

State of Alabama Banking Department:
1-334-242-3452

Web Page – www.bank.state.al.us

Savings Institutions- Office of Thrift Supervision:

Toll-Free Nationwide 1-800-842-6929
Web Page – www.ots.treas.gov

For assistance with State Tax Returns:

State of Louisiana-Department of Revenue:

1-225-219-7318 or 1-225-219-0102
Web page – www.rev.state.la.us

Mississippi State Tax Commission:

1-601-923-7000
Web Page – www.mstc.state.ms.us

Alabama Department of Revenue

1-334-242-1099
Web Page – www.ador.state.al.us