VITA Volunteer Income Tax Assistance

MINNESOTA · REVENUE

Minnesota Intake Sheet – Page 1

Did you…

Federal Income Tax Return	**Yes**	**No**	**Unsure**
1. Receive a MN Property Tax refund as mobile home or homeowner in 2024?	☐	☐	☐
2. Receive a MN one-time rebate of $260 for you or family member in 2024 (most got this in 2023)?	☐	☐	☐

Minnesota Income Tax Return	**Yes**	**No**	**Unsure**
1. Have a permanent and total disability?	☐	☐	☐
2. Move since last filing a tax return?	☐	☐	☐
3. Military Concerns – for you or your spouse:			
a. Serve as a member (or veteran) of the military or Active Guard Reserve?	☐	☐	☐
b. Complete 20 years of military service (active and/or reserve component)?	☐	☐	☐
c. Receive a military pension or other retirement pay from military service?	☐	☐	☐
d. Have service-related disability rated as permanent or total?	☐	☐	☐
4. Pay any K-12 education expenses for which you have receipts?	☐	☐	☐
5. Make payments for long-term care insurance? Policy #_____ Amt paid_____	☐	☐	☐
6. Complete a master's program started after 6/30/2017 to be a licensed teacher?	☐	☐	☐
7. Make payments on a postsecondary education loan? Original loan amt_____	☐	☐	☐
8. Contribute to a Section 529 College Savings Plan?	☐	☐	☐
9. Have a First-Time Homebuyer Savings Account?	☐	☐	☐
10. Make charitable contributions in excess of $500?	☐	☐	☐
11. Experience a stillbirth in 2024?	☐	☐	☐
12. Receive a public service pension on income that was not subject to Social Security tax?	☐	☐	☐
If yes, start and end dates of employment: _____			
13. Make estimated state income tax payments or apply last year's refund to this year's tax?	☐	☐	☐
14. Pay rent for your personal residence during any part of 2024 and have a CRP?	☐	☐	☐
15 Want to contribute to the MN Nongame Wildlife Fund?	☐	☐	☐

Important Questions

Did you receive a letter from the MN Dept of Revenue about your MN return last year?	☐	☐	☐
Do you want to opt-in for advance payment(s) of your 2025 Child Tax Credit, if eligible?	☐	☐	☐
Do you agree to allow the MN Dept of Revenue to share the amount of your AGI with MNsure?	☐	☐	☐

Minnesota Property Tax Refund (for Homeowners or Mobile Home Owners Only – NOT Renters)

If filing for a homeowner property tax refund, complete questions below and on reverse.	**Yes**	**No**	**Unsure**
1. Contribute to a ROTH IRA?	☐	☐	☐
3. Own your personal residence and occupy it on January 2, 2025?	☐	☐	☐
3. Live in a mobile home during any part of the tax year (circle one on each line)?	☐	☐	☐
a. If yes, did you rent or own the lot? Rent Own			
b. If yes, did you rent or own the mobile home? Rent Own			
4. If you own your residence or mobile home, did any non-dependents live with you in 2024?	☐	☐	☐
If yes, were any of them boarders (OOS), renters (OOS), or parents?	☐	☐	☐

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Minnesota Intake Sheet – Page 2

If you are filing for a **Homestead Credit Refund (NOT applicable to Renters but applicable for a Mobile Home owner who rents the property it stands on),** we need to know if you had any of the following income in 2024. Income from these sources will NOT be added to your taxable income and will NOT add to your tax bill, but must be included as part of your "household income" to correctly figure your homeowner refund.

Please check all the following income sources that apply to you:

Government Assistance (M1PR Line 4)	**Yes**	**No**	**Unsure**
1. Supplemental Security Income (SSI)	☐	☐	☐
2. MN Diversionary Work Program (DWP) Benefits	☐	☐	☐
3. MN General or Emergency Assistance (GA or EA)	☐	☐	☐
4. MN Family Investment Program (MFIP)	☐	☐	☐
5. MN Supplemental Aid (MSA)	☐	☐	☐
6. MN Refugee Cash Assistance	☐	☐	☐
Other Nontaxable Income (M1PR Line 6)			
1. Adoption assistance (subsidy and employer paid)	☐	☐	☐
2. Alimony received §§	☐	☐	☐
3. Canceled, discharged or forgiven debt §§	☐	☐	☐
4. Community Access for Disability Inclusion Waivers (CADI)	☐	☐	☐
5. Compensated Work Therapy (CWT) §§	☐	☐	☐
6. Disability benefits (do not include Veterans disability) §§	☐	☐	☐
7. Education expenses paid by employer §§	☐	☐	☐
8. Foster care payments, including adult foster care	☐	☐	☐
9. Gain from sale of home §§	☐	☐	☐
10. IRA contributions not on W-2	☐	☐	☐
11. Long-term care benefits*	☐	☐	☐
12. IRA (ROTH and traditional) distributions (including distribution portions made to charity) §§	☐	☐	☐
13. Pension/annuity payments §§	☐	☐	☐
14. Personal injury settlement*	☐	☐	☐
15. Reduction in rent for caretaking (incl amt shown on CRP)	☐	☐	☐
16. Scholarships, fellowships, and grants received by taxpayer or spouse, but not dependent §§	☐	☐	☐
17. Sick pay*	☐	☐	☐
18. Strike benefits	☐	☐	☐
19. Transit and parking costs paid by employer §§	☐	☐	☐
20. Treaty exclusions for Native Americans	☐	☐	☐
21. Tuition waivers or reductions	☐	☐	☐
22. VEBA Contributions by Employee §§	☐	☐	☐
23. Worker's compensation benefits*	☐	☐	☐

Preparer Notes:

* Can exclude to extent taxpayer can show funds used to pay medical expenses.

§ To the extent that it reduced Federal adjusted gross income.

§§ To the extent not included in Federal adjusted gross income.

All nontaxable income is entered via the *Enter your Total Household Income* line on the *Minnesota M1PR Return* menu. Ln 6 income, however, may be programmed to be entered here OR may be from the M1 Menu>*Additional Nontaxable Income (Forms M1PR)*

See "do not include" list for Line 6 in the *M1PR Instructions* booklet for income that is not added to total household income.

Also do not include dollar value of food/food stamps, clothing and medical supplies from government agencies, fuel assistance, subsidized housing that reduces rent (i.e., HUD/Sect 8), government assistance medical care (GAMC).