Intake/Interview and Quality Review Sheet

Social Security Number:
    Taxpayer SS#: _____   **Spouse SS#:** _____

Contact Information:
Phone: _____   Email: _____
Message Phone: _____   Other: _____

Please check box if GRIC member, other federally-recognized tribe, or not affiliated with any Tribe

Taxpayer:	GRIC	☐	Other Tribe	☐	None	☐
Spouse:	GRIC	☐	Other Tribe	☐	None	☐

Did you <u>live and work</u> on <u>your own</u> reservation?

	<u>Live</u>		**<u>Work</u>**	
Taxpayer:	Yes ☐	No ☐	Yes ☐	No ☐
Spouse:	Yes ☐	No ☐	Yes ☐	No ☐

Provide information for Other Income received:

Taxpayer	Per Capita:	Yes ☐	No ☐	Amount: _____
Spouse	Per Capita:	Yes ☐	No ☐	Amount: _____

Pension: If you receive pension is it from work from <u>your own</u> reservation?

Taxpayer:	Yes ☐	No ☐
Spouse:	Yes ☐	No ☐

Did you receive any Advanced Child Tax Credit for dependents on your tax return?
              Yes ☐   No ☐

Did any of your Dependents have <u>income over $4300</u> for the tax filing year?

Dependent #1:   Yes ☐   No ☐
Date of Birth #1: _____   SS #1: _____

Dependent #2:   Yes ☐   No ☐
Date of Birth #2: _____   SS #2: _____

Dependent #3:   Yes ☐   No ☐
Date of Birth #3: _____   SS #3: _____

If Direct Deposit for refund, complete information below and initial to verify information is correct:

Bank Name: _____   Initials: _____
          Savings   or   Checking *(please circle)*
Bank Routing #: _____   Initials: _____
Account #: _____   Initials: _____

Consent: I give my consent for GRIC VITA Program to use my data from my tax return, specifically number of returns completed and the refund amount that is a combined amount with all VITA participants to promote the GRIC VITA Program on social media. The combined totals are shared with the Government & Management Standing Committee and Community Council in the Internal Audit Department's Quarterly Report.

Signature: _____
Example: "This year, the GRIC VITA Program completed a total of 4,200 tax returns that provided $3.7 million in refunds to the Community Members and Employees with no fees charged."