

# 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 live and work on your own reservation?**

	Live		Work	
Taxpayer:	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Spouse:	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>

**Provide information for Other Income received:**

Taxpayer:	Per Capita	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Amount: _____
Spouse:	Per Capita	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Amount: _____

**Pension: If you receive pension is it from work from your own reservation?**

Taxpayer:	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Spouse:	Yes <input type="checkbox"/>	No <input type="checkbox"/>

**Did any of your Dependents have income over \$4,400 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: \_\_\_\_\_

**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."*