

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 a pension is it from your work or from your own reservation? (Examples: OMB, AZ Public Safety Personnel Retirement Systems, and BIA)

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

If Direct Deposit for refund, complete information below and initial to verify it's correct?

Bank Account Type: Savings ☐ Checking ☐

Bank Name: _____ Initials: _____

Bank Routing Number: _____

Account Number: _____

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."