

## Intake Checklist

***If you are not a student start at "Part B"***

<b>Part A</b>	<b>Yes</b>	<b>No</b>
Are you a full-time Student?		
Have you completed a bachelor's degree before?		
Do you have last year's Oregon State form 1040?		
Did you incur additional school expenses in the calendar year of 2023? <ul style="list-style-type: none"> <li>- <i>Books, Supplies, Computers, etc.</i></li> <li>- <i>Housing or utilities (excluding WIFI)</i></li> </ul>		
i. If yes, how much money was spent on additional school supplies?		
ii. If yes, how much money was spent on housing or utilities?		
How many years have you been a student?		
How many prior years have you claimed the ATOC?		
Have you lived out of state in the past year? If yes, <ul style="list-style-type: none"> <li>- <i>When did you move?</i></li> <li>- <i>What state did you move from?</i></li> </ul>		
<b>If you are filing for New York state tax return</b>		
Are you on your parent's Insurance?		
i. If yes, do you have form 1095 A, B, or C		

### **Part B**

Have you earned income outside of Oregon?		
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### **Non-Mandatory**

*For direct deposit of return*

Checking Number	
Routing Number	

### **For the Interviewer to complete:**

Does the taxpayer qualify for the Oregon Kids Credit? <ul style="list-style-type: none"> <li>- <i>Is their AGI \$30,000 or less?</i></li> <li>- <i>Do they have a kid(s) under the age of 6 at the end of the tax year?</i></li> </ul>		
Is the taxpayer using a new or renewing ITIN number to file?		
Is this a basic or advanced return?		