

Minnesota Intake Questions TY25

Taxpayer Name: _____

Please mark appropriate checkboxes if a question is applicable for the tax year

County you live in _____

Minnesota Consents

- ☐ I authorize the Minnesota Department of Revenue to share necessary return information with MNSure for the purpose of contacting me with information about my estimated eligibility for free or reduced-cost health insurance
- ☐ Wish to contribute to the Minnesota Nongame Wildlife Fund
If so, how much? \$ _____ (this will reduce your refund or increase your amount due)
- ☐ Wish to contribute to the Minnesota State Elections Campaign Fund. This will not increase your tax or reduce your refund.
If so, \$5 each to which party? Your Code: _____
- ☐ Spouse wishes to contribute. Spouse Code: _____

Choose one of the Political Party Codes

- | | |
|-----------------------------------|----------------------------|
| 11 - Republican | 16 - Libertarian |
| 12 - Democratic/Farmer-Labor | 17 - Legal Marijuana Now |
| 14 - Grassroots/Legalize Cannabis | 18 - Independence-Alliance |
| | 99 - General Campaign Fund |

Minnesota Property Tax Refund – Homeowners and Mobile Homeowners

- ☐ (A) Received non-taxable program payments (SSI, MFIP, MSA, GA, EA, DWP, MN Housing Support)? If so, how much? \$ _____
- ☐ (A) Received any other forms of non-taxable income? If so, how much? \$ _____ Describe: _____
- ☐ (B) Contributed to a ROTH IRA
- ☐ (B) Owned your personal residence and lived in it as of Jan 2, 2026?
- ☐ (A) Did any non-dependent adult(s) live in your home If yes, complete the Co-Occupant Income Worksheet
- ☐ (B) Do you have the **Property Tax Statement Payable in 2026** (rec'd in March 2026, not Estimated Tax form)
- ☐ (A) Did you file a M1PR as a homeowner last year and received a "special refund" on line 38? Amount _____
- ☐ (A) Lived in a mobile home during any part of the tax year?
- Did you rent or own the **Mobile Home**? ☐ Rent MH and have CRP ☐ Own MH and have **2026** Property Tax Statement
- ☐ Rent Lot and have CRP

Federal Income Tax Return — Itemized Deductions

- ☐ (A) Received a MN Property Tax refund as a homeowner or mobile homeowner in 2025 (and expect to itemize deductions this year)?
If so, what was the amount of the MN Property Tax refund? \$ _____

Minnesota Income Tax Return — please be prepared to provide information details. Discuss questions with your

Tax Preparer. *TAX PREPARER: Refer to Minnesota Scope Manual for elements not on this list that are Out of Scope*

- ☐ (B/A) Paid rent for your personal residence any part of the tax year and have a **2025** CRP.
If yes: Received non-taxable program payments (SSI, MFIP, MSA, GA, EA, DWP, MN Housing Support)? If so, how much? \$ _____
Received any other forms of non-taxable income? If so, how much? \$ _____ Describe: _____
- ☐ (B) Made estimated MN income tax payments or applied last year's refund to this year's tax
- ☐ (B/A) Made charitable contributions (cash and/or non-cash) in excess of \$500
- ☐ (B) Received Minnesota Advanced Child Tax Credit payments. Do you have a statement from the state for the amount? Yes / No
- ☐ (A) Paid any K-12 education expenses for which you have receipts
- ☐ (A) Received pension income based on prior Public Service employment which was not covered by Social Security
Starting employment date _____ Ending employment date _____
- ☐ (A) Made payments for long-term care insurance?
If so: Company Name _____ and Policy Number _____
- ☐ (A) You or your spouse made Student Loan payments on loans used for your own higher education. If yes \$ _____ total amount each
- ☐ (A) Income from another state, other state tax withheld OR moved from another state *Possibly out of scope*
- ☐ (A) Work and live on American Indian Reservation of which you are an enrolled member
- ☐ Military-related Items – if pertinent for you or your spouse as a member or veteran:
 - ☐ (A) Have 20 years of military service (active and/or reserve component)
 - ☐ (A) Military pension or other retirement pay from military service
 - ☐ (A) Service-related disability rated as permanent or total
 - ☐ (A/M) Active Guard Reserve (AGR)
- ☐ (A) Experienced a stillbirth in 2025
- ☐ (A) Had a child born in the tax year and are not participating in an employer pre-tax dependent care assistance program
- ☐ (A) Licensed teacher completed a master's program started after 6/30/2017
- ☐ (A) Contributed to a Section 529 College Savings Plan
- ☐ (A) Took distributions from a Section 529 College Savings Plan
- ☐ (A) Have designated a savings account as a First-Time Homebuyer Savings Account
- ☐ (A) Received income from CNCS for Post Service Education Awards for service in AmeriCorps Natl Service Program
- ☐ (A) Received taxable:
 - Service Employees International Union (SEIU) stipend payment
 - Long-term Service and Support Workforce Incentive grant
 - Coerced Debt Forgiveness
 - Nursing Facility Workforce Incentive grants
 - Consumer Enforcement Public compensations
 - Foreign Service Retirement and Disability System income
 - Foreign Service Pension System income