

Minnesota Intake Questions TY25

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

Taxpayer Name: _____

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: _____ *Choose one of the Political Party Codes*

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:

<p>Service Employees International Union (SEIU) stipend payment</p>	<p>Consumer Enforcement Public compensations</p>
Long-term Service and Support Workforce Incentive grant	Foreign Service Retirement and Disability System income
Coerced Debt Forgiveness	Foreign Service Pension System income
Nursing Facility Workforce Incentive grants	