



Name	Date
County	School district <i>(town if not known)</i>

New York State (answer questions 1-29)		Yes	No	Unsure
1.	Was your federal adjusted gross income plus New York additions more than \$4,000 (\$3,100 if you are single and can be claimed as a dependent on another taxpayer's federal return)?			
2.	Was your only source of income Social Security benefits?			
3.	Did you purchase taxable property or services for use in New York State without paying sales and use tax at the time of purchase? (line 59 on Form IT-201 or line 56 on Form IT-203 – do not leave blank)			
4.	Do you keep records of all your income, expenses, and deductions?			
5.	Were you (and your spouse if filing a joint return) a New York State resident for the entire tax year? (If No, skip to question 9.)			

Credits				
6.	Did you pay child support through the NYS support collection unit for at least one-half of the year? (IT-209)			
7.	Were you (or your spouse if filing a joint return) an active volunteer firefighter or ambulance worker for the entire tax year? (IT-245)			
8.	Was your total household income (of all individuals living with you) \$18,000 or less? (IT-214)			
9.	Did you pay undergraduate college tuition expenses by cash, check, credit card, or with borrowed funds, or funds from a qualified state tuition program (such as 529 College Savings Program), for yourself, your spouse, or your dependent(s)? Note: This does not include scholarships or other types of financial aid that are not required to be repaid. (IT-272 or IT-203-B)			
10.	Did you pay nursing home expenses (special assessment) during the tax year? (IT-258)			
11.	Did you pay long-term care insurance premiums during the tax year? (IT-249)			
12.	Was any of your income taxed by another state or local government (IT-112-R) or did you pay taxes to a province of Canada? (IT-112-C)			
13.	Do you use clean fuel oil (biofuel) for residential heating? (IT-241)			
14.	Did you purchase or lease solar energy system equipment and install it at your principal residence during the tax year? (IT-255)			
15.	Did you purchase or lease a geothermal system that was placed in service at your residence during the year? (IT-267)			
16.	Did you own and live in NYS real property for more than 6 months, receive the STAR credit or exemption, and pay real property taxes? (IT-229)			
17.	Did you receive the Homeowner's Tax Rebate? (IT-229 and IT-196)			

Modifications (additions and subtractions)				
18.	Did you contribute to the NYS retirement system or NYC flexible benefits program during the tax year? (shown in box 14 on your W-2 as 414(h) or IRC125)			
19.	Did you make contributions to a NYS 529 College Savings Plan during the tax year?			
20.	Did you receive interest on U.S. government bonds during the tax year?			
21.	Did you (or your spouse if filing a joint return) receive a pension or other distribution from a New York State, local government, or federal government pension plan?			
22.	Did you (or your spouse if filing a joint return) receive a pension or other distribution that was not from a New York State, local government, or federal government pension plan?			
23.	If you answered Yes to question 22, was the person who received the pension 59½ or older during the tax year?			

Modifications (additions and subtractions) (continued)		Yes	No	Unsure
24.	Did you receive pension payments as a beneficiary of a pension plan?			
25.	If you answered Yes to question 24, what share of that pension did you receive? _____			
26.	Did you (or your spouse if filing a joint return) receive disability income during the tax year? (IT-221)			
27.	Did you repay any amount of income received in a prior year that was previously included in New York adjusted gross income (for example, if you were overpaid unemployment income last year and had to repay a portion this year that did not reduce this year's unemployment income)? (IT-225, S-141; IT-196, line 24 or 34; or IT-257)			
28.	Did you receive a healthcare and mental hygiene worker's bonus?			
29.	Do you have a student loan forgiveness award from the Higher Education Service Corporation (HESC) student loan?			
If you did not live or work in New York City or Yonkers STOP here				
New York City		Yes	No	Unsure
30.	Were you (or your spouse if filing a joint return) a New York City resident for any part of the tax year?			
31.	If you answered Yes to question 30, how many months did you (and your spouse if filing a joint return) live in New York City during the tax year?	You _____	Spouse _____	
32.	Did you (or your spouse if filing a joint return) maintain living quarters (a residence) in New York City during the tax year?			
33.	If you answered Yes to question 32, how many days did you (and your spouse if filing a joint return) spend in New York City during the tax year?	You _____	Spouse _____	
34.	Does your W-2 (box 14) show an amount that was deducted or deferred from your salary under a benefit program established by New York City public employers on your behalf?			
Yonkers		Yes	No	Unsure
35.	Were you (or your spouse if filing a joint return) a Yonkers resident for any part of the tax year?			
36.	If you answered Yes to question 35, how many months did you (and your spouse if filing a joint return) live in Yonkers during the tax year?	You _____	Spouse _____	
37.	Did you earn income (self-employment or wages) from a source located in Yonkers?			

Additional notes: