

QUESTIONS SPECIFIC FOR IOWA

1. School District Number: _____ School District Name: _____
2. If you are claiming children on your return as dependents, how many of these children currently have Health Care Coverage? _____ How many do not? _____
3. If you are married, and filing your Federal Return as Married Filing Joint, do you want to file your Iowa Return as Married Filing Separate Returns (Filing Status 4)?
YES / NO / NA (If Injured Spouse protection is needed, the IA Return must be MFS (Filing Status 4))
If Yes, enter your Spouse's Full Name: _____, SSN _____ - _____ - _____ and Income for 2008 _____
4. Did you / your spouse pay any out of pocket Health Insurance Premiums, Dental Insurance Premiums, Medicare B, Medigap, Medicare D voluntary prescription drug insurance, or Long Term Nursing Home coverage? (Pretax, payroll deduction payments do not count) **YES / NO** If YES, Amount Paid _____
5. Did you / your spouse participate in College Savings Iowa or the Iowa Advisor 529 Plan in 2008? **YES / NO**
If YES, Amount contributed by you _____ Beneficiary's Name _____
Amount contributed by your spouse _____ Beneficiary's Name _____
6. Did you pay a School District surtax and or an EMS surtax on your Iowa Return, line 56, last year? **YES / NO** If YES, Amount Paid _____
(If itemizing, this is deductible on IA Sch A line 4a this year)
7. Did you receive a Federal Refund last year? **YES / NO** If YES, Amount Received _____
If NO, Amount Due _____ Did you pay the balance due? **YES / NO** If YES, How much did you pay? _____
8. Was any part of your Federal Refund due to EIC, or Additional Child Tax Credit (ACTC) last year? **YES / NO**
If YES, Amount of EIC Received _____, Amount of ACTC Received _____
- Early Childhood Development Tax Credit (NOT allowed: Food, Lodging, Membership Fees, and any activity teaching Religious Tenets)
9. Did you pay for any of the following items, for your 3 year – 5 year old child, in 2008? **YES / NO**
If YES, amount you paid for: Preschool _____ Child Development Books _____ Supplies used in learning Activities _____
Lesson plans & Curricula _____ Child Development and educational activities outside of the home _____
10. Did you pay for Tuition/Textbooks for a child, Kindergarten – 12 years? **YES / NO** (only for Accredited Iowa Schools that are Not Operated for Profit)
If YES, TOTAL amount paid in 2008 _____ Description / amount paid: _____ / _____
11. Would you like to donate to one or more of the following voluntary contribution funds? **YES / NO**
(Any donation will reduce your refund, or increase the amount you owe)
If YES, please fill in an amount: Fish and Wildlife _____ Iowa State Fair _____
Firefighters / Veterans _____ Child Abuse Prevention _____
12. Consumer's Use Tax
If you / your spouse purchased items for use in Iowa from a business located outside of Iowa and the seller did not charge you Iowa sales tax, you owe a 5% tax known as the consumer's use tax on the price of the purchase(s). This tax can now be e-filed electronically online through the department's Web site at www.state.ia.us/tax or by touch-tone telephone at 1-800-514-8296. **We can not file the Consumer Use Tax for you.**
13. Is there any other information you think we should know, credits you feel you are eligible for, or any other questions you have? **YES / NO**
If YES, what would you like to add? _____