



Name		Date	
County		School district	
<b>New York State (answer questions 1-18)</b>			<b>Yes No</b>
1.	Do you keep records of all your income, expenses, and deductions?		
2.	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 7.)		
3.	Did you pay <b>undergraduate</b> college tuition expenses for yourself, your spouse, or your dependent(s)? (IT-272)		
4.	Did you pay child support through the NYS support collection unit for at least one-half of the year? (IT-209)		
5.	Were you (or spouse) an active volunteer fire fighter or ambulance worker for the entire tax year? (IT-245)		
6.	Was your total household income (all individuals living with you) under \$18,000? (IT-214)		
7.	Did you pay nursing home expenses (special assessment) during the tax year? (IT-258)		
8.	Did you pay long-term care insurance premiums during the tax year? (IT-249)		
9.	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)?		
10.	Do you use clean fuel oil (biofuel) for residential heating? (IT-241)		
11.	Did you purchase or lease solar energy system equipment and install it at your principal residence during the tax year? (IT-255)		
12.	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)		
13.	Did you contribute to the NYS retirement system or NYC flexible benefits program during the year? (shown in box 14 on your W-2 as 414(h) or IRC125)?		
14.	Did you make contributions to a <b>NYS</b> 529 College Savings Plan during the tax year?		
15.	Did you earn interest on U.S. government bonds during the tax year?		
16.	Did you receive pension payments from New York State or a NYS local government, or a federal government pension plan?		
17.	Are you receiving any pension payments, for work performed, that are not from NYS, NYS local government, or the federal government?		
18.	Are you receiving pension payments as a beneficiary of the pension plan?		
<b>If you did not live or work in New York City or Yonkers STOP here</b>			
<b>New York City</b>			<b>Yes No</b>
19.	Were you a New York City resident for any part of the tax year?		
20.	How many months did you (and your spouse if filing a joint return) maintain living quarters (a residence) in New York City during the tax year?	You Spouse ____ - ____	
21.	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?		
<b>Yonkers</b>			<b>Yes No</b>
22.	Were you a Yonkers resident for any part of the tax year?		
23.	How many months did you (and spouse if married filing joint return) maintain living quarters in Yonkers during the tax year?	You Spouse ____ - ____	
24.	Did you earn income (self-employment or wages) from a source located in Yonkers?		

**Additional notes:**