

Form A – Claim Form and Document Checklist

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Please check all that apply and attach copies of the documents to this form:

Forms

- ☐ Form A – Claim Form and Document Checklist (REQUIRED)
- ☐ Form B – Verification of Other Expenses (REQUIRED *only if you are claiming other expenses for which you have only bank, debit, or credit card statements and no receipts or bills*)
- ☐ Form C – Verification of Tax Services (REQUIRED *if you are claiming reimbursement for tax preparation services or tax advice*)

2016 Tax Documents

I owed \$

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(amount) in federal income tax for Tax Year 2016.

I have paid \$

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(amount) in fees and penalties for Tax Year 2016.

I have paid \$

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 (amount) in interest for Tax Year 2016.

My current remaining balance to the IRS for Tax Year 2016 is \$

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(amount based on CP19 or CP89, printout of online portal, or other IRS documents).

I pay monthly payments to the IRS in the amount of \$

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(amount) for Tax Year 2016.

I have approximately

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months remaining to pay off my federal income taxes for Tax Year 2016 (*divide current remaining balance by amount of monthly payments*).

- ☐ 2016 Tax Return showing federal income tax owed to the IRS
- ☐ Letters, Bills, Payment Plan, or Installment Agreement from the IRS for 2016 Tax Year (including any IRS Letter 2840C, Forms 9465 or 433-D, Notices CP14 or CP80, printouts of online portal, or other IRS documents)

2017 Tax Documents

I owed \$. (amount) in federal income tax for Tax Year 2017.

I have paid \$. (amount) in fees and penalties for Tax Year 2017.

I have paid \$. (amount) in interest for Tax Year 2017.

My current remaining balance to the IRS for Tax Year 2017 is \$. (amount based on CP19 or CP89, printout of online portal, or other IRS documents).

I pay monthly payments to the IRS in the amount of \$. (amount) for Tax Year 2017.

I have approximately months remaining to pay off my federal income taxes for Tax Year 2017 (divide current remaining balance by amount of monthly payments).

- ☐ 2017 Tax Return showing federal income tax owed to the IRS
- ☐ Letters, Bills, Payment Plan, or Installment Agreement from the IRS for 2017 Tax Year (including any IRS Letter 2840C, Forms 9465 or 433-D, Notices CP14 or CP80, printouts of online portal, or other IRS documents)

Expenses Related to Tax Advice

I paid \$. (amount) for tax advice or tax preparation services for Tax Year 2016.

- ☐ Receipts or other documentation for 2016 Tax Year Preparation Services
- ☐ Receipts or other documentation for 2016 Tax Year advice or counseling

I paid \$. (amount) for tax advice or tax preparation services for Tax Year 2017.

- ☐ Receipts or other documentation for 2017 Tax Year Preparation Services
- ☐ Receipts or other documentation for 2017 Tax Year advice or counseling

Other Expenses

I incurred additional expenses in the amount of \$ **.** **(total amount reflected in documents below) as a result of the federal income tax I owed for Tax Year 2016.**

- ☐ Documentation of late rent fees as a result of debt owed to the IRS for Tax Year 2016
- ☐ Documentation of late credit card fees as a result of debt owed to the IRS for Tax Year 2016
- ☐ Documentation of late car payment fees as a result of debt owed to the IRS for Tax Year 2016
- ☐ Documentation of other expenses as a result of debt owed to the IRS for Tax Year 2016

I incurred additional expenses in the amount of \$ **.** **(total amount reflected in documents below) as a result of the federal income tax I owed for Tax Year 2017.**

- ☐ Documentation of late rent fees as a result of debt owed to the IRS for Tax Year 2017
- ☐ Documentation of late credit card fees as a result of debt owed to the IRS for Tax Year 2017
- ☐ Documentation of late car payment fees as a result of debt owed to the IRS for Tax Year 2017
- ☐ Documentation of other expenses as a result of debt owed to the IRS for Tax Year 2017

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(CHECK ALL THAT APPLY)

☐ TAX YEAR 2017

(CHECK ALL THAT APPLY)

☐ TAX YEAR 2017

<u>Amount of Expense</u>	\$.		
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I declare under penalty of perjury under the laws of the State of Washington that the foregoing is true and correct.

Signed at _____(City), _____(State) on _____(Date)

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Signature

Print Name _____

Form C – Verification of Tax Services

Please fill out the following form only if you are requesting reimbursement for tax preparation services or tax advising for the 2016 or 2017 Tax Years and if it was not your regular practice to use a tax preparation service or tax advising prior to Tax Year 2016.

Please note that in addition to this form, you must also submit receipts or other documentation demonstrating the amount that you paid for tax preparation services or tax advising in order to get reimbursed.

First Name:[illegible]

MI:

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Last Name:[illegible]

Address:

[illegible]

City:

[illegible]

State:

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ZIP Code:

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Phone:

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Email:[illegible]**IPOne Number:**

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I, _____, (*PRINT YOUR NAME*), am an Individual Provider and have provided services through Washington state DSHS since _____ (*YEAR IN WHICH YOU BEGAN PROVIDING SERVICES*). I provide this sworn declaration in support of my claim for expenses related to tax preparation services or tax advice that I used as a result of the fact that federal income tax was not properly withheld from my earnings in _____.

(CHECK ALL THAT APPLY)

☐ TAX YEAR 2016☐ TAX YEAR 2017

It was not my regular practice to use a tax preparation service (other than basic online filing services such as TurboTax) or tax advice prior to

(CHECK ALL THAT APPLY)

☐ TAX YEAR 2016☐ TAX YEAR 2017

I declare under penalty of perjury under the laws of the State of Washington that the foregoing is true and correct.

Signed at _____(City), _____(State) on _____(Date)

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Signature

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Print Name _____