

Low Income Taxpayer Form

This document shows the NMLA LITC case info page in LegalServer, as modified from the stock LITC module.

Returns Prepared

- Active Is True / Is Yes
- Database ID Is Exactly 446788
- Type Is any of LITC Tax Returns Prepared

Show More Filters

Type	Date Created	Calendar Year	Tax Year	Number of Returns Prepared (services)	Return Link	Note
No results						

Hide

Add LITC Returns Prepared Form

Type	LITC Tax Returns Prepared
Date Created (required)	<input type="text" value="mm / dd / yyyy"/>
Calendar Year (required)	<input type="text"/>
Tax Year (required)	<input type="text"/>
Note	<input type="text"/>

LITC Case Information

Involves Child-Based Tax Credit	<input type="radio"/> Yes	<input type="radio"/> No
ESL Taxpayer	<input type="radio"/> Yes	<input type="radio"/> No
Return Preparation Only (not consultation or controversy)	<input type="radio"/> Yes	<input type="radio"/> No
Consultation Only (no controversy) 	<input type="radio"/> Yes	<input type="radio"/> No
No Service Provided (awaiting contact, deselect pending)	<input type="radio"/> Yes	<input type="radio"/> No

IF 'YES' TO ANY OF THE PRIOR 3 QUESTIONS, STOP HERE

Check legal problem code (LPC) - should be 23 if an EITC issue is present

Referred to Taxpayer Advocate Service (TAS)	<input type="radio"/> Yes	<input type="radio"/> No
Number of Federal Tax Returns Prepared In Current Reporting Period	<input type="text"/>	
ITIN Application Prepared	<input type="radio"/> Yes	<input type="radio"/> No
Representation by Volunteers	<input type="radio"/> Yes	<input type="radio"/> No
Was controversy amount for any one year greater than \$50,000?	<input type="radio"/> Yes	<input type="radio"/> No
Income Exceeds 250% of Federal Poverty Guidelines	<input type="radio"/> Yes	<input type="radio"/> No
More than One Tax Year Worked	<input type="radio"/> Yes	<input type="radio"/> No
Related State Tax Matter	<input type="radio"/> Yes	<input type="radio"/> No
Joint Representation of Taxpayers	<input type="radio"/> Yes	<input type="radio"/> No

* I recommend adding text box to enter "Date of TAS referral" – I have requested this but our LS person has not done it yet.

Worked in More than One IRS Function	<input type="radio"/> Yes <input type="radio"/> No
Notice of Appearance Entered in US Tax Court	<input type="radio"/> Yes <input type="radio"/> No
Represented in US Tax Court Case Without Notice of Appearance	<input type="radio"/> Yes <input type="radio"/> No
Informal Consultation in US Tax Court Without Representation	<input type="radio"/> Yes <input type="radio"/> No

IRS Function/Court (13424-K)

Please select only ONE function or court item in this section.

All the functions can be selected in this one drop-down menu

LITC Function/Court

Please Select

Controversy Issues (13424-B)

Income Issues

Hold down Ctrl (PC) or command (Mac) to select more than one option.

- 1 - Wages
- 2 - Interest / Dividends (Schedule B)
- 3 - Business Income (Schedule C)
- 4 - Capital Gain or Loss (Schedule D)
- 5 - IRA / Pension
- 6 - Social Security Benefits
- 7 - Alimony
- 8 - Rental, Royalty, Partnership, S Corp (Schedule E)
- 9 - Farming Income (Schedule F)
- 10 - Unemployment

Deduction Issues

Hold down Ctrl (PC) or command (Mac) to select more than one option.

- 15 - Alimony
- 16 - Education Expenses (Including student loan interest)
- 17 - Moving Expenses
- 18 - IRA Deduction
- 19 - Medical and Dental Expenses
- 20 - State and Local Taxes
- 21 - Home Mortgage Interest
- 22 - Other Interest Expenses
- 23 - Charitable Contributions
- 24 - Casualty and Theft Losses

Credit Issues

Hold down Ctrl (PC) or command (Mac) to select more than one option.

- 28 - Child and Dependent Care Credit
- 29 - Education Credits
- 30 - Child Tax Credit / Additional Child Tax Credit
- 31 - Earned Income Tax Credit
- 32 - First-Time Homebuyer Credit
- 33 - Premium Tax Credit
- 34 - Other Credits

Status Issues
Hold down Ctrl (PC) or command
(Mac) to
select more than one option.

35 - SSN / TIN
36 - ITIN
37 - Filing Status
38 - Personal/Dependency Exemptions
39 - Injured Spouse
40 - Innocent Spouse
41 - Employment-Related Identity Theft
42 - Refund-Related Identity Theft
43 - Nonfiler
44 - Worker Classification

**Tax/Refund/Return/Statute of
Limitations Issues**
Hold down Ctrl (PC) or command
(Mac) to
select more than one option.

45 - Self-Employment Tax
46 - Suspected Return Preparer Fraud
47 - Estimated Tax Payments
48 - Withholdings
49 - Refund
50 - Assessment Statute of Limitations
51 - Collection Statute of Limitations
52 - Refund Statute of Limitations

Penalty and Addition to Tax Issues
Hold down Ctrl (PC) or command
(Mac) to
select more than one option.

53 - Trust Fund Recovery Penalty
54 - Other Civil Penalties
55 - Additional Tax on Distributions from Qualified Retirement Plans
56 - Individual Shared Responsibility Payment

Collection Issues
Hold down Ctrl (PC) or command
(Mac) to
select more than one option.

57 - Payments
58 - Installment Payment Agreement (IPA)
59 - Offer-In Compromise (OIC)
60 - Currently Not Collectible (CNC)
61 - Liens
62 - Levies (Including Federal Payment Levy Program)

Date Form Completed/Updated

01 / 08 / 2025

LITC Closed Case Outcomes

Brought Into Filing Compliance

☐ Yes ☐ No

Brought into Collection
Compliance

☐ Yes ☐ No

Total Dollars Refunded in Cash ?

\$

Total Decrease in Corrected tax
liabilities, penalties, and interest ?

\$

Continue »