

APPOINTMENT SCHEDULER

Using the *Appointment Scheduler Questionnaire (script)* and the *Appointment Schedule* you will take calls from people looking to book an appointment at your tax site(s), screen them to ensure that they are eligible for the program, and book appointments.

Length of time for each appointment	
Single Person	30 minutes
Couple	45 minutes
Multiple tax years or more than two family members	1 hour

What to record on your appointment schedule
Person's name Scheduled appointment time Number of tax returns to be completed If there are multiple family members (<i>each person who is completing a tax return needs to come in person to sign, example: couples: both partners need to be in attendance</i>)

****Make sure you check in with your site coordinator about how often they would like to receive the updated appointment schedule.***

2017 tax year GROSS Income Guidelines	
Family size	Income
1 person	\$35,000
2 persons	\$45,000
3 persons	\$47,500
4 persons	\$50,000
5 persons	\$52,500
each additional person	Add \$3,000

The volunteer program does not complete income tax and benefit returns for	
Deceased persons	Bankrupt individuals
Individuals who have capital gains (or losses)	Employment expenses
Business or rental income or expenses	Interest income over \$1,000
Other complex returns	

Required Documents for Tax Preparation	
T4 slips – income statement	T5007 slips – social assistance income statement (AISH or income support)
T5 slips – investment/interest income statement	T2 slips - tuition payment statement
RRSP contribution slips	Medical and dental receipts for you, your partner, and children
Child Care receipts (must include name and address of licensed daycare)	Charitable donation receipts
Bus passes & bus pass receipts *for taxes prior to 2017	RC62 slip - Universal Child Care Benefit *for taxes prior to 2018
Piece of government issued identification	Social Insurance Number (SIN) for tax filers (not required for children)
Banking information for direct deposit	

To complete benefits/subsidies applications	
Alberta Personal Health Cards for you, your spouse and your children	Photocopy of utility bill with your name and current address
Photocopy of your landed immigrant papers	Photocopy of last Notice of Assessment (2017 tax year)

Note: You still need to file your taxes if you don't have any income. Some people may not have any documents to bring with them to their appointment.

Appointment Scheduler Questionnaire (Script)

A.S. Hello, this is e4c Make Tax Time Pay, _____ (insert name) speaking. How may I help you?

Caller: I would like to book an appointment.

A.S. I would be happy to help you book an appointment at our tax site located at _____. Our tax site is operating _____ (let the caller know dates and times your site is operating) does that work with your schedule?

IF YES: In order to book your appointment I need to ask you a few questions, is that ok with you?

IF NO, direct them back to 211 or check your sheet for the appointment booker information for other MTTP tax sites.

Screening Questions

A.S. Are you self-employed?

Caller: If yes, we cannot complete their taxes

A.S. Will you be filing for someone who is bankrupt or deceased?

Caller: If yes, we cannot complete their taxes

A.S. How much income did you/your family earn I 2018?
(check the income guidelines, if their income falls outside of the guidelines)

Response if people do not qualify for MTTP:

I am sorry, we are unable to assist you with filing your taxes as the volunteer tax preparation program has very specific guidelines and unfortunately we are not able to help you.

Questions to help you schedule their appointment

Are you filing as an individual? Or for your family?

How many members in your family will be filing their taxes?

If they are filing for multiple years schedule more time for their appointment.

What is your name and phone number?

Will you be filing taxes for multiple years?

If they are filing for multiple years schedule more time for their appointment.

Will you be bringing your children to the tax site?

You may need to schedule more time for their appointment if they are bringing their children

A.S. The next available time that we have available is:

if the time offered doesn't work offer some other options

A.S. There are a number of documents that you need to bring to your appointment, do you have a pen handy so you can write them down? refer to list of required documents

A.S. Thank you, I have scheduled your appointment for _____ (confirm date, time and location). If for any reason you are unable to make your appointment, please give us a call back at _____(your site phone number). Thank you. Good bye.