

Script to recruit clients for the self-filing/TurboTax pilot project

I understand that you want to file your 2019 income tax. We currently have a pilot project where we help people to file their taxes remotely on their own. In this project, we provide access to a free software for the tax preparation, plus phone support for using the software and to learn what information to enter in the software depending on your personal tax situation.

Only if client wants to file 2019 taxes only, start the screening below.

1. Would you be interested in this service and in learning how to file your own taxes ?

No > no problem, we also have the regular income tax clinic for 2019... (if possible, take note of why they are not)

Yes > (then continue)

I need then to assess your computer abilities, because in this self-filing project you will have to use the software yourself.

2. How comfortable are you with using a computer?

No > **Not (really, very) comfortable**
If you are not really comfortable with using a computer, then it is better that I refer you to the normal income tax clinic where a volunteer or staff would prepare your taxes for you...

Yes > **Comfortable / somewhat comfortable**
(then continue)

3. Then I will ask you a few more questions on your use of technology

a. Do you do any online shopping?

Yes or No

b. Do you use online banking?

Yes or No

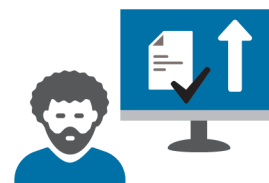
c. Do you have “my account” with the CRA (Canada Revenue Agency)?

Yes or No

(Do you have an account with CRA to access your tax-related information?)

Yes > **0 or 1** – This project require a fairly good ability to use a computer, so instead, I am going to refer you to the normal income tax clinic ...

Yes > **2 or 3** – (then continue)



Script to recruit clients for the self-filing/TurboTax pilot project

All good! Great!

I will refer you to the person responsible for the project. They will contact you to assess your tax situation and explain how you will be able to self-file your taxes this year.

4. You seemed to be ready for the self-filing project. Let me ask you two more questions:

a. Do you have internet?

Yes or No

If No > it would be better to have internet access at home for this project, so I will refer you to the normal income tax clinic ...

b. Do you have a computer or a laptop?

Yes or No

If No > it would be better to have a computer at home for this project, so I will refer you to the normal income tax clinic ...

Then take first name and phone number.

