Sample client intake form
(based on WoodGreen Income Tax Clinic 2020)

This intake form is used by WoodGreen Community Services tax clinics. The information is collected in order to enable the tax volunteer to support the client, and also to help the tax clinic understand the client population served.

Your own virtual self-file tax clinic may not require collection of all information shown here. Use the intake collection that is best for your clinic.

Client Information

1. First Name ______

2. Last Name ______

3. Date of Birth ______

4. Street Address ______

5. Apartment/Unit # ______

6. City ______

7. Postal Code ______

8. Phone Number ______

9. Phone Type ______

10. Email Address ______

11. What type of device are you using to file your income taxes?

(This question can help prepare the volunteer for any coaching steps specific to the type of device.)

______

______

12. What is your immigration status in Canada?

- ☐ Canadian Citizen (Born in Canada)
- ☐ Canadian Citizen (Born outside Canada)
- ☐ Permanent Resident/Landed Immigrant
- ☐ Convention Refugee
- ☐ Refugee Claimant
- ☐ Study Permit
- ☐ Work Permit
- ☐ Visitor/Tourist
- ☐ Other
- ☐ Prefer not to answer

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13. How long have you lived in Canada?

14. What is your highest level of education completed?

- ☐ No formal education
- ☐ Completed high school
- ☐ Completed trade/vocational school
- ☐ Completed college/university
- ☐ Completed post-graduate school
- ☐ Prefer not to answer

15. What is your current employment status?

- ☐ Full time employment (›20 hours/week)
- ☐ Part time employment (‹20 hours/week)
- ☐ Unemployed
- ☐ Student
- ☐ Retired
- ☐ Caregiver
- ☐ Self-employed
- ☐ Prefer not to answer

16. Are you in school full time or part time?

☐ Full-time ☐ Part-time

17. Are you currently looking for work?

☐ Yes ☐ No

Marital Status Info

1. Did your marital status change in 2019?

- ☐ Yes – go to number 19
- ☐ No – go to number 20

2. On what date did the change happen?

3. Marital Status

- ☐ Single
- ☐ Married or Common Law
- ☐ Separated
- ☐ Divorced
- ☐ Widowed

4. Do you want to prepare your tax return with your spouse/common-law partner?

- ☐ Yes, I want to prepare our returns at the same time – go to number 22
- ☐ No, I want to prepare my return separately from my spouse/partner – go to number 28
- ☐ No, my spouse was not a resident of Canada in 2019 – go to number 28

Spouse/Partner Information

(if client is married or common-law)

5. Partner First Name ______________________

6. Partner Last Name ______________________

7. Partner Phone Number ______________________

8. Partner Email Address ______________________

9. Partner Date of Birth ______________________

10. Is your spouse/partner currently living in Canada?

☐ Yes ☐ No

Dependent Information

11. Do you have any children in your custody under the age of 19?

- ☐ Yes – go to number 29
- ☐ No – go to number 31

12. How many children do you have in your care?

13. Do any of the children have a Disability Tax Credit approved by the Canada Revenue Agency?

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Family Head: 2019 Tax Info & Deductions

14. Family Head:
Did you immigrate to Canada in 2019?

☐ Yes ☐ No

15. Family Head:
Do you rent or own your residence?

☐ Rent
☐ Own
☐ Neither

16. Family Head:
What were your 2019 sources of income (check all that apply)?

☐ Employment income [T4]
☐ Employment Insurance [T4E]
☐ Social assistance (OW/ODSP) or WSIB [T5007]
☐ Old Age Security [T4A(OAS)]
☐ Canada Pension Plan (Retirement or Disability) [T4A(P)]
☐ Retirement savings [T4RSP/T4RIF]
☐ Investment income [T5/T3]
☐ Other income (e.g.: private pension, student grant, fees for service) [T4A]
☐ No income to report in 2019
☐ Other

17. Family Head: What deductions or credits are you claiming? (CHECK ALL THAT APPLY)

☐ Union or professional dues
☐ RRSP contributions
☐ Medical expenses
☐ Charitable donations
☐ Tuition fees (T2202)
☐ Ontario Seniors Public Transit Credit
☐ Disability Tax Credit (approved by the Canada Revenue Agency)
☐ None of the above

18. Family Head:
Are you registered for Direct Deposit with the Canada Revenue Agency?

☐ Yes ☐ No

19. Family Head:
Would you like to register for Direct Deposit with the CRA?

Note to client that this is not something that can be done automatically in Turbo Tax, and they will need to contact CRA separately at 1-800-959-8281

20. Will you be filing as well for a spouse/partner & need to complete Spousal Tax Info & Deductions Section?

☐ Yes – Proceed to complete this section again for the Partner
☐ No (N/A or not filing together) – all done!