

Sample form

Appointment outcomes

This is the text of a sample outcomes measurement form used by WoodGreen Community Services in their virtual self-file tax clinic.

They use MSForms, completed by tax coach volunteers, to collect information on this and other forms.

The first two weeks of running this service, WoodGreen asked volunteers to complete this form if they completed the tax return for the client and did not ask about reasons for not completing tax return.

As of June 25, 2020, WoodGreen started using this new outcomes tracker (text below) which is to be filled out for all clients regardless of outcome.

1. Client's First Name _____

2. Client's Last Name _____

3. Client's Date of Birth _____

4. Coaching Service Provided By _____

5. Date of Service _____

6. Did you complete the clients tax return today?

Yes – go to #10

No – go to #7

7. Reason for not being able to complete client tax return?

Client did not show to appointment

Tech connection issues

Client return ineligible: self-employment income

Client return ineligible: filing on behalf of a deceased client

Client return ineligible: income over threshold

Client return ineligible: capital gains

Client return ineligible: investment income over \$1000

Client choose to leave appointment before end

Client had privacy concerns or suspicion of scam

Other

8. Was the appointment rebooked?

Yes – go to #9

No – end form



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Tracking these outcomes enables the tax clinic to be able to report on its impact to the community, and to better evaluate our services.

9. Which model of service was the client booked into?

- CVITP – Telephone Model (remember to provide on-call supervisor with client’s details in order to make sure client’s ID will be checked) – end of form
- CVITP – Internet/Video Conferencing Model – end of form
- Intuit – Coaching/Self-File Model – end of form

10. Year of Return _____

11. Did the client have a refund or balance owing? _____

12. Refund Amount _____

13. Balance Owing _____

14. Gross Income (Line 150) _____

15. Net Income (Line 236) _____

16. GSTC (annual) _____

17. OTB (annual) _____

18. Ontario Seniors Homeowners Property Tax Grant _____

19. CCB (annual) _____

20. NetFile Confirmation # _____