

# Introduction scripts

---



## Introduction for “One-Step” Virtual Self-Assisted Tax Model

**“Hi, my name is (Insert Your Name), I am calling from the WoodGreen Tax Clinic for your Coaching tax appointment.**

I’m going to be coaching you through completing your taxes today. Before we start, I’m just going to give you a brief overview of what is going to happen. We expect this appointment to take approximately 1 hour. I’m going to start by filling out our intake form with you and make sure that you have all the documents you need in front of you. Then we will start to prepare your taxes or review if you have already started. When we are complete, I will walk you through the tax summary and if you have no further questions and I will walk you through how to file your return.

### Supervisor Contact Info

Name

---

Phone

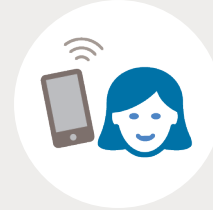
---

Coaching service provided by

---

Email

---



## Voicemail Script

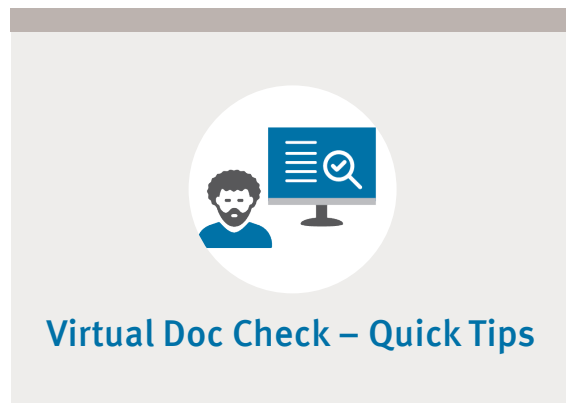
**“Hello, my name is (YOUR NAME) from WoodGreen’s Income Tax Clinic. I’m calling in regards to your income tax appointment on (APPT. DATE & TIME).**

Please call (CONTACT # FOR THE TAX SHIFT SUPERVISOR – SEE BELOW] to get connected with me for your appointment.

If I cannot reach you today and you need to reschedule, please call the Income Tax booking line at (416) 645-6000 ext. 1187 during business hours. Thank you.

# Introduction scripts

---



**Explain that you will be asking questions about their source(s) of income and other expenses that relate to taxes to make sure that you identify all of the relevant information to accurately prepare their return.**

- Use the client’s complete intake form and the (fillable) Doc Check sheet to guide the questions you can consider asking during your interview
- Avoid making assumptions that the client knows what documents are or are not relevant
- If the client is unsure what document(s) they have in front of them:
  - **On Video?** Ask them to hold it up to the camera to see if you can identify the document
  - **Over the phone?** Ask the client to describe the information on the tax slip (e.g.: tax slip number, box numbers, tax year)
- Reference the “Understanding Common Tax Slips” section of your Doc Check Reference Guide to provide verbal descriptions of the various tax slips that the client may be searching for
- Ask the client to read and/or provide details descriptions of the documents in front of them so you can “narrow down” what might be relevant
- At the end of Doc Check, ask if they have any questions, any additional documents or if they remember including anything else in their tax return last year