## In-person Supported Tax Filing

# Appointment outcomes sample form

This is the text of a sample form adapted from an outcomes measurement form used by WoodGreen Community Services (that they administered through MSForms). WoodGreen began using their appointment outcomes form in June 2020 and initially only asked volunteers to fill out the form if the client's tax return was complete. However, after two weeks, they adjusted their procedure and asked volunteers to complete this form regardless of whether or not the client was successful in filing their taxes.

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

**1.** Client's First Name ______________________

**2.** Client's Last Name ______________________

**3.** Client's Date of Birth ______________________

**4.** Date ______________________

**5. Did the client complete their tax return today?**

☐ Yes – go to #10

☐ No – go to #7

**6. Reason for client not being able to complete 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 $1,000

☐ Client choose to leave appointment before end

☐ Client had privacy concerns or suspicion of scam

☐ Other

**7. Was the appointment rebooked?**

☐ Yes – go to #9

☐ No – end form

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**8.** 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

**9.** Year of Return ______

**10.** Did the client have a refund or balance owing? ______

**11.** Refund Amount ______

**12.** Balance Owing ______

**13.** Gross Income (Line 150) ______

**14.** Net Income (Line 236) ______

**15.** GSTC (annual) ______

**16.** OTB (annual) ______

**17.** Ontario Seniors Homeowners Property Tax Grant ______

**18.** CCB (annual) ______

**19.** NetFile Confirmation # ______