

Script to recruit clients for in-person supported tax filing project

I understand that you want to file your [current tax year] income tax. We are running a 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.

If client wants to file their taxes for the current tax year only (i.e. are up-to-date on filing their taxes for previous years¹), 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 [current tax year] ... (if possible, take note of why they are not)
- Yes** > (then continue)

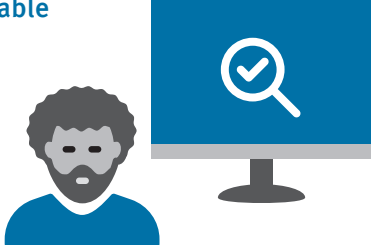
I need to ask if you are a Canadian citizen or permanent resident, as we are not able to support individuals who are temporary workers to file their taxes through this program. Are you a Canadian citizen or permanent resident?

- No** > refer them to a local settlement organization or migrant worker support organization (especially if you know that they have free or low-cost tax clinics that can support migrant workers file their taxes)
- Yes** > (then continue)

I also need to assess your computer abilities, because in this supported tax 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)



¹Most community organizations running this program have chosen to offer the Supported Tax Filing model only to clients who need to file their current year taxes (i.e. are up-to-date on filing their income tax for previous years). However, should an organization choose to adjust this criteria, this script should also be adjusted to reflect this change so that the individual trying to recruit the client into this program is able to effectively screen clients.

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All good! Great!

I am going to share this handout with you [share one-pager for client preparation] that will guide you through the process of gathering the information you'll need to file your taxes and starting to explore the tax software you will use to file your taxes. You will also see the contact information for [insert name of contact] who you can contact if you have any questions.

I will also refer you to the person responsible for the project. They will contact you [via email/ phone] to check in with you before the tax filing workshop.

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

- a. Do you have an email address (or access to an email address)?
 Yes or No
- b. Do you do any online shopping?
 Yes or No
- c. Do you use online banking?
 Yes or No
- d. 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 requires a fairly good ability to use a computer, so instead, I am going to refer you to the normal income tax clinic ...

Yes > 3 or 4 – (including a “yes” to indicate they have an email address or access to an email address, as they will need this to open an account with the TurboTax software)...then continue

4. You seemed to be ready for the supported tax filing project. Let me ask you one more question:

- a. Would you be available to join one of these workshops to file your taxes? (Intake staff shares available options with client)
 Yes or No

Then take client's first name and phone number/email address.



*Note that this sample script does not include screening questions to determine if an individual's income makes them eligible to participate based on your agency's own income criteria. While income can be a sensitive topic, potential participants can be alerted to the income cut-offs your agency uses and can self-select into the program if they meet these criteria.