

Script to recruit clients for virtual 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)

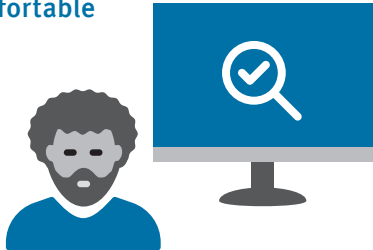
I need to ask if you are a Canadian citizen or permanent resident, as we are not able to support individuals through this program who are temporary workers to file their taxes. Are you a Canadian citizen or permanent resident?

- 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 will refer you to the person responsible for the project. They will contact you to assess your tax situation and explain how you will be able to file your taxes this year.

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

- a. Do you do any online shopping?
 Yes or No
- b. Do you use online banking?
 Yes or No
- c. 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 > **2 or 3** – (then continue)

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

- a. Do you have the internet?
 Yes or No

If No > it would be better to have internet access at home for this project, so I will refer you to the normal income tax clinic ...

- a. Do you have a computer or laptop?
 Yes or No

If No > it would be better to have internet access at home for this project, so I will refer you to the normal income tax clinic ...

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.