Sample client intake form
(based on WoodGreen Income Tax Clinic 2020)

This intake form is used by WoodGreen Community Services tax clinics. The information is collected in order to enable the tax volunteer to support the client, and also to help the tax clinic understand the client population served.

Your own supported tax filing clinic may not require collection of all information shown here. Use the intake collection that is best for your clinic.

Client Information

1. First Name ______________________
2. Last Name ______________________
3. Date of Birth ______________________
4. Street Address ______________________
5. Apartment/Unit # ______________________
6. City ______________________
7. Postal Code ______________________
8. Phone Number ______________________
9. Phone Type ______________________
10. Email Address ______________________

11. For virtual supported tax filing: what type of device are you using to file your income taxes?

(This question can help prepare the volunteer for any coaching steps specific to the type of device.)

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12. What is your immigration status in Canada?

- ☐ Canadian Citizen (Born in Canada)
- ☐ Canadian Citizen (Born outside Canada)
- ☐ Permanent Resident/Landed Immigrant
- ☐ Convention Refugee
- ☐ Refugee Claimant
- ☐ Study Permit
- ☐ Work Permit
- ☐ Visitor/Tourist
- ☐ Other
- ☐ Prefer not to answer

13. How long have you lived in Canada?

14. What is your highest level of education completed?

- ☐ No formal education
- ☐ Completed high school
- ☐ Completed trade/vocational school
- ☐ Completed college/university
- ☐ Completed post-graduate school
- ☐ Prefer not to answer

15. What is your current employment status?

- ☐ Full time employment (›20 hours/week)
- ☐ Part time employment (‹20 hours/week)
- ☐ Unemployed
- ☐ Student
- ☐ Retired
- ☐ Caregiver
- ☐ Self-employed
- ☐ Prefer not to answer

16. Are you in school full time or part time?

☐ Full-time ☐ Part-time

17. Are you currently looking for work?

☐ Yes ☐ No

Marital Status Info

18. Did your marital status change in 2019?

- ☐ Yes – go to number 19
- ☐ No – go to number 20

19. On what date did the change happen?

20. Marital Status

- ☐ Single
- ☐ Married or Common Law
- ☐ Separated
- ☐ Divorced
- ☐ Widowed

21. Do you want to prepare your tax return with your spouse/common-law partner?

- ☐ Yes, I want to prepare our returns at the same time – go to number 22
- ☐ No, I want to prepare my return separately from my spouse/partner – go to number 28
- ☐ No, my spouse was not a resident of Canada in 2019 – go to number 28

Spouse/Partner Information

(if client is married or common-law)

22. Partner First Name __________

23. Partner Last Name __________

24. Partner Phone Number __________

25. Partner Email Address __________

26. Partner Date of Birth __________

27. Is your spouse/partner currently living in Canada?

☐ Yes ☐ No

Dependent Information

28. Do you have any children in your custody under the age of 19?

- ☐ Yes – go to number 29
- ☐ No – go to number 31

29. How many children do you have in your care?

30. Do any of the children have a Disability Tax Credit approved by the Canada Revenue Agency?

☐ Yes ☐ No

Family Head: 2019 Tax Info & Deductions

31. Family Head:
Did you immigrate to Canada in 2019?

☐ Yes ☐ No

32. Family Head:
Do you rent or own your residence?

☐ Rent
☐ Own
☐ Neither

33. Family Head:
What were your 2019 sources of income (check all that apply)?

☐ Employment income [T4]
☐ Employment Insurance [T4E]
☐ Social assistance (OW/ODSP) or WSIB [T5007]
☐ Old Age Security [T4A(OAS)]
☐ Canada Pension Plan (Retirement or Disability) [T4A(P)]
☐ Retirement savings [T4RSP/T4RIF]
☐ Investment income [T5/T3]
☐ Other income (e.g.: private pension, student grant, fees for service) [T4A]
☐ No income to report in 2019
☐ Other

34. Family Head: What deductions or credits are you claiming? (CHECK ALL THAT APPLY)

☐ Union or professional dues
☐ RRSP contributions
☐ Medical expenses
☐ Charitable donations
☐ Tuition fees (T2202)
☐ Ontario Seniors Public Transit Credit
☐ Disability Tax Credit (approved by the Canada Revenue Agency)
☐ None of the above

35. Family Head:
Are you registered for Direct Deposit with the Canada Revenue Agency?

☐ Yes – proceed to question 37
☐ No – proceed to question 38

36. Family Head:
Would you like to register for Direct Deposit with the CRA?

Note to client that this is not something that can be done automatically in Turbo Tax, and the client will need to contact CRA separately at 1-800-959-8281

37. Will you be filing as well for a spouse/ partner & need to complete Spousal Tax Info & Deductions Section?

☐ Yes – proceed to complete this section again for the Partner
☐ No (N/A or not filing together) – all done!