

Virtual Supported Tax Filing Appointment outcomes sample form

This is the text of a sample outcomes measurement form used by WoodGreen Community Services (that they administered through MSForms). WoodGreen began using this form in June 2020 and initially only asked volunteers to fill it out 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. Coaching Service Provided By _____

5. Date of Service _____

6. Did you complete the clients tax return today?

Yes – go to #10

No – go to #7

7. Reason for not being able to complete client 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

8. Was the appointment rebooked?

Yes – go to #9

No – end form



Appointment outcomes sample form

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9. 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

10. Year of Return _____

11. Did the client have a refund or balance owing? _____

12. Refund Amount _____

13. Balance Owing _____

14. Gross Income (Line 150) _____

15. Net Income (Line 236) _____

16. GSTC (annual) _____

17. OTB (annual) _____

18. Ontario Seniors Homeowners Property Tax Grant _____

19. CCB (annual) _____

20. NetFile Confirmation # _____