

Using the New Intake Booklet During Tax Preparation

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The Tax-Aide Intake Booklet (Form 13614-C) must be completed and used for each Taxpayer's return. Although it has undergone major modifications this year, the basic requirements are unchanged. Normally a Client Facilitator and two certified Counselors are involved in the process.

Note the importance of both Counselors making notes during the interview process. here is a description of who can do what.

Client Facilitator Duties

- Make sure that the taxpayer has completed the unshaded portion of the booklet to the best of their ability. This can include answering any questions that are not related to tax law. (e.g. explaining the consents or what the optional questions are for and if they must be completed)
- Help the taxpayer sort and organize their paperwork to aid in completing the form. This does not include any tax answers or advice.
- Any Tax or Scope Questions that may arise should be immediately reviewed with the Local Coordinator or a Certified Counselor designated by the Local Coordinator.
- The Local Coordinator may assign some of the above work to be completed by certified Counselors as a local option.
- **WARNING**: Only a certified Counselor may make any marks or notations in the **shaded areas** of the booklet.

Preparing Counselor Duties

- Must conduct an interview with the taxpayer(s) reviewing the entire form.
- Indicate in the shaded portion that you have adequately addressed every item on the form. Indication may be a line drawn through an item or check mark, but it should be adequate to show the Quality Reviewer that it has been addressed.
- Answer any questions or unresolved issues on the form or uncovered during the interview process. Note on the form how that was completed in a manner suitable for the Quality Reviewer to complete their review.

Quality Review Counselor Duties

- Must conduct an interview with the taxpayer(s) reviewing the entire form.
- Review all notes entered by the counselors for correctness.
- Answer any questions or unresolved issues on the form or uncovered during the Quality Review process. Make additional notes on the form as required.
- Review with the preparing counselor any changes to ensure agreement.