Intake Interview: Basic Steps
Tax Season 2024

1. Verify the client's household income is within our eligibility limit.

2. Make photocopies of the following:
    a. Photo ID for the primary taxpayer and the spouse
    b. SSN cards or ITIN letters for every person listed on the tax return

3. Review the intake forms.
    a. Ensure all fields are complete
    b. Double-check for phone, address, and email
    c. Get answers for "unsure" responses
    d. Verify there is documentation for "yes" items for income and expenses
    e. Troubleshoot with clients if they are missing something

Depending on the tax year and documents presented by the client, there may be additional checklists you will fill out with the client.

4. Determine the level of return.

5. Fill out the processing envelope, which will stay on-site:
    - At this stage, do NOT write the client's SSN on the envelope
    - Do NOT place any client documents in the envelope

6. Place the processing envelope in the queue for tax preparation.

7. Complete the client envelope and give to client with all their documentation including:
    - intake sheet
    - copies of the client's IDs and Social Security Cards/ITIN letters
    - tax documents like W2s and documentation of child care expenses

For Drop Off intake interviews

During step 3, you will also complete an online Drop Off checklist during the interview and include it with everything that will be scanned.

For steps 5-6, a tax staff member will (instead of creating a processing envelope) create a new ticket in the Hub and indicate the tax certification for the return(s). They will scan the taxpayer's documents and upload them to the ticket. They will then submit the ticket to be prepared by a volunteer tax preparer. More information is provided in the role-specific training for intake staff.