

Subject: VITA Intake Questionnaire

Date: Friday, December 15, 2023 at 10:25:03 AM Eastern Standard Time

From: Jennifer L. Szafir

To: Jennifer L. Szafir

Jen,

Thank you for the intake tool, this will be extremely useful and make scheduling much more efficient. A couple suggestions:

1. Could you please include a reference to the CAAS website that lists the documents required at the appointment? People often forget and have to come back another time, so scheduling-wise this can be inefficient. An extra reminder would be helpful.
2. It might be helpful to add the expected time to complete the survey at the beginning so that people have an idea.

Other than that, I think it's great! Once complete, I will incorporate a link to the questionnaire on our website so that people can find it prior to making an appointment.

In terms of upkeep, the links to the IRS forms should remain up-to-date automatically, as they keep the same link each year and simply update the new forms to the old URLs. As discussed, if there are ever substantial changes made to the intake form, I will contact you to implement those changes into the questionnaire.

I look forward to getting this up and running for use this tax season!

Thank you,
CAAS Site Coordinator