



Intake Form: Administer Justice

Case Action (Tax LITC)

Client Served:

Client Name: _____

Case #: _____

Action Taken By: _____

Action Date: _____

Issue Types (Choose One):

- Account / Notice Inquiry
- CNC Unable To Pay
- Collection Statute
- Copies of Returns/Trans/Reports
- EITC
- ELS Assistance
- Failure to File Penalty
- Injured Spouse
- Innocent Spouse
- Installment Agreements
- Invalid Dependent Name/SS#
- Invalid SS#

Action Types (Choose One):

- Tax Education
- Tax Intervention
- Other _____
- ITIN
- Levy
- OIC
- Other
- Processing Amended Return
- Refund Assistance
- Tax Court

Action Status (Choose One):

- Active
- Finished
- Referred
- Other _____

Location of Service:

- Administer Justice Office
- Attorney Location
- Other: _____

Referral Needed:

- In House Out

Action Notes (Notes + What Services Were Provided to Client):

See Page 2 for additional notes...

Referral Role:

- Attorney
- Financial
- Mediation
- Church Support
- Other _____

Follow Up Instructions (What Should Be Done Next):

See Page 2 for additional instruction...

Referred To (Specific Volunteer):

Follow Up Needed:

- Yes No

