

END OF SEASON - DATA COLLECTION CHECKLIST 2008 EITC Campaign: Alameda County

Thanks to all the sites for making this a great season thus far! To help make sure we complete the season with success, the final items to be submitted to Urban Strategies Council from each site at the conclusion of their tax preparation season is listed below.

1. FINAL TAXWISE DATA BACKUP – DUE WEDNESDAY, APRIL 23, 2008

This is the last backup of the season. Please make sure that to include all clients that have come to your site and authorized release of their tax information. The backups can be returned by email to eitc@urbanstrategies.org or by postal service to:

Steve Spiker
Attn: Vita Sites
Urban Strategies Council
672 Thirteenth St.
Oakland, CA 94612

2. OPERATIONS AND ASSET BUILDING DATA – DUE WEDNESDAY, APRIL 23, 2008

This is the form used to collect generalized data about each site's operation and does not contain personalized data. This is important because it is the only way we capture the impact of the Earn It! Keep It! Save It! campaign on those individuals who choose not to authorize the release of their tax information.

Please complete and submit the following Operations & Asset Building Data excel document to Urban Strategies Council:
<http://www.urbanstrategies.org/programs/econopp/vita/vitadocs/documents/AdditionalOperationsandAssetBuildingDataForm12.13.07.xls>

3. TAXWISE SUMMARY REPORTS - DUE WEDNESDAY, APRIL 23, 2008

You will need to generate **two summary reports** from TaxWise ("Preparer Summary" and "Tax Form Type by Filing Status") and e-mail them to Urban Strategies. Data included in these report are: total returns, total e-files, total refunds, filing status, etc. otal Returns

***Please email the Operation/Asset Building and Taxwise Summary reports to eitc@urbanstrategies.org.*

4. CONFIDENTIALITY WAIVER & SURVEY FORMS – DUE FRIDAY, MAY 9, 2008

The confidentiality waiver & survey form is the 10 question survey with the client signature on the waiver form. The forms for all clients should be returned Steve Spiker at Urban Strategies Council. It can be returned either by mail or hand delivered at the post-season Site Coordinator Wrap Meeting (Date TBD). All forms whether the filer authorizes data use or not must be sent to Urban Strategies.

Steve Spiker
Attn: VITA forms
Urban Strategies Council
672 Thirteenth St.
Oakland, CA 94612

5. DATA COLLECTION INSTRUCTIONS - For specific instructions about the reports and forms listed above, download:
<http://www.urbanstrategies.org/programs/econopp/vita/vitadocs/documents/DataCollectionInstructionsHandout12.26.07.pdf>

All reporting forms and instructions can be downloaded at:
<http://www.urbanstrategies.org/programs/econopp/vita/vitadocs/vitadocs.html>.

Need assistance?

Please contact Steve Spiker, Urban Strategies Council
at (510) 463-2951 or eitc@urbanstrategies.org.