

How to Mark a Client Goal as 'Exited'

Click here to edit the main section of the goal...

CLIENT: Devaprasad Kantharaj (#30)

KeyWare

view client goal
goal case notes
print »
goal list
client view

Goal:
(edit)

Goal Title: VITA: Preparation and Electronic Filing of Income Taxes
Date Due: 4/15/2008
Started: 4/17/2008
Completed:
Exited:
Entered By: Devaprasad Kantharaj

Steps:
(add) (dates)

Due	Completed	Step
4/15/2008	4/14/2008	Gather tax paperwork, all W-2s, all bank info, all information from all sources of income, social security cards for everyone on the tax return and picture id.
4/15/2008		Come to Program Offices in Norwich on Tuesdays or New London on Wednesdays
4/15/2008		Tax Preparation
4/15/2008		File Federal and State Taxes Electronically
4/15/2008		Verify electronic filing was accepted by IRS and follow-up if rejected until IRS acceptance
4/15/2008		Included Earned Income Tax Credit (EITC)

Enter the date the client exited the goal here...

CLIENT: Devaprasad Kantharaj (#30)

KeyWare

Edit Goal

Goal: VITA: Preparation and Electronic Filing of Income Taxes
Due: 4/15/2008
Started: 4/17/2008
Completed:
Exited: 4/17/2008

save cancel delete

Click here to save the changes...

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Client goal successfully marked as 'exited'

