## How to Mark a Client Goal as 'Exited'

|  |  | /   | Click here to edit the m   | ain section of the goal       |
|--|--|---|--|-------------------------------|
| Tribev                                   | Vare Universal System<br>ENT: Devaprasad Kantharaj (#30)                   |   | client menu <b>S</b> TVCCA   |                               |
|  | KeyWate  | View Client Go  | al   |                               |
| 0  | (calt)   | Goal Title:         VITA: Preparation and Electronic           Date Due:         4/15/2008           Started:         4/17/2008           Completed:         Evided:  | Filing of Income Takes   |                               |
| view clie<br>goal cas<br>print »         | view client goal<br>goal case notes<br>print »<br>goal list<br>client view | Entered By: Devaprasad Kantharaj Due Completed Step   |  |                               |
| goal list<br>client vie                  |  | 4/15/2008     4/14/2008     Getter tax paperwork, all<br>sources of income, social<br>and picture id.       4/15/2008     Come to Program Offices i<br>Wednesdays       4/15/2008     Tax Preparation       4/15/2008     File Federal and State Tax       4/15/2008     File Federal and State Tax       4/15/2008     Verify electronic filing war<br>RFS acceptance       4/15/2008     Included Earned Income Tax | W-2's, all bank info, all information from all<br>security cards for everyone on the tax return<br>In Norwich on Tuesdays or New London on<br>es Electronically<br>e accepted by IRS and follow-up if rejected until<br>ex Credit (ETIC) |                               |
| CLIENT: Devo                             | ENT: Devaprasad Kantharaj (#30)  | Elfront.  | Enter the dat<br>the g   | te the client exited oal here |
|  | KeyWare<br>Goal:<br>Due:<br>Started:<br>Completed:<br>Exited:              | VITA: Preparation and Electronic Filing of Income Taxes 4/15/2008 4/17/2008   |  |                               |
|  |  |   | save cancel delete   |                               |
| Click here to save the                   | changes  | /   |  |                               |
| Tribev                                   | Vare Universal System<br>ENT; Devaprasad Kantharaj (#30)                   |   | client menu 🎽  |                               |
| Kej                                      | Ware   | View Client Go  | al   |                               |
| o<br>O                                   | (edit)   | Ogal Title:         VITA: Preparation and Electronic           Date Due:         4/15/2008           Started:         4/17/2008           Completed:         Fxtfed:           Fxtfed:         4/17/2008  | Filing of Income Taxes   |                               |
| view clir<br>goal cas<br>print »         | entgoal<br>e notes<br>Steps:<br>(add) (dates)                              | Entered By: <u>Devaprasad Kantharaj</u><br>De Completed Step  |  |                               |
| yoan nac                                 |  | ArtS/2003 4/14/2008 Cattler tax paper work, all     sources of income, social     and picture id.     Come to Program Offices i     Vednesdays     4/15/2008 Tax Preparation     Art School Tax Preparation   | eveze, as bone info, air information from all<br>security cards for everyone on the tax return<br>In Norwich on Tuesdays or New London on  |                               |
| Client goal success<br>marked as 'exited | fully  | 4/15/2008 Verify electronic filling wa<br>IRS acceptance<br>4/15/2008 Included Earned Income To   | s accepted by IRS and follow-up if rejected until xx Credit (ETC)  |                               |



TVCCA Information Systems