



Intake Form: Justice Center

Case Action (Page 1 of 2)

Client Served:

Case #:

Client Name: _____

Case #: _____

Volunteer Name: _____

Action Date: _____

#1. Service Role (Choose One):

- Type of Service Provided:**
- Legal
 - Financial
 - Conflict Coaching
 - Mediation
 - LITC Professional
 - Church Services
 - Office Help
 - Other

#2. Action Types (Choose One):

- Type Of Action Taken:**
- Administrative Hearing
 - Document Help
 - Education
 - Intake
 - Litigation
 - Other
 - Rep w/o Litigation

#3. Service Location (Choose One):

- Location Service Provided:**
- Main Office
 - Other _____

#4. Issue: (Choose One)

- Legal:**
- Consumer Utilities
 - Criminal
 - Education
 - Employment
 - Family
 - Health
 - Housing
 - Immigration
 - Other
 - SocSecurity / Public Benefits
 - Will / POA
- Non-Legal:**
- Budget Counseling
 - Conciliation / Mediation
 - LITC Tax Support
 - Office Meeting
 - Other

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



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#6. Referral Needed:

In House Out

#7. Referral Role:

Attorney

Financial

Mediation

Church Support

Other

#8. Referred To This Volunteer:

#9. Follow Up Needed:

Yes No

#11. LITC Tax Type (Choose One):

Optional:

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#

\$ Tax Controversy: _____

\$ Taxes Paid: _____

Taxes Saved: _____

ITIN

Levy

OIC

Other

Processing Amended Return

Refund Assistance

Tax Court

#10. Follow Up Instructions (What Should Be Done Next):
