GetYourRefund New VITA Partner Information

CODE for AMERICA

GetYourRefund

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# GetYourRefund

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About Code for America

Code for America believes government can work for the people, and by the people, in the digital age, starting with the people who need it most. We build digital services that enhance government capabilities, and we help others do the same across all levels of government. We organize thousands of volunteers across nearly 80 chapters nationwide who improve government in their local communities. Our goal: a 21st century government that effectively and equitably serves all Americans. Learn more at codeforamerica.org.

About GetYourRefund

Code for America is currently partnering with four local VITA organizations (in California, Colorado, Arizona, and Georgia) to pilot a digital VITA service for the 2020 tax season, with the hope that this model will allow VITA to make tax prep accessible online to more clients.

The new service, GetYourRefund, provides a way to get connected with VITA services from anywhere in the country. At the mobile-friendly site, taxpayers can answer simple questions about their household situation, securely upload their tax documents, and get connected to VITA to answer any questions. The VITA team will remotely prepare the tax return, speak with the taxpayer to review their return, and file the return with taxpayer consent. By piloting a new tax prep service that meets client needs for remote support, Code for America aims to help low-income families access the tax credits that they deserve.

Expanding VITA Partnerships

Our original plan for the 2020 season was to support the preparation of 5,000 returns through our initial GetYourRefund pilot. In light of VITA site closings to prevent the spread of COVID-19, we are looking to expand our VITA partnerships to allow us to collaboratively serve more clients this season. We are working to streamline our VITA partner onboarding process to make this possible (this document will continue to evolve accordingly). Thanks to our generous philanthropic funders, GetYourRefund is free for participating VITA partners.

Next steps if you are interested in joining the pilot:

- Fill out this interest form
- We will reach out to you within a few days to schedule a meeting via phone/video
Demo

You can view a demo of GetYourRefund at demo.getyourrefund.org - please note that after entering test info into the ID.me site, you will see some fake data for “Veronica” as a response. This is not an error, but a way to show how the tool works without forcing you to enter your personal information. In addition, there should be an "upload photo (testing only)" link at the bottom of the selfie page - you can use that to upload a fake selfie from your computer rather than using your phone.

Pilot Goals

1. To reach more EITC-eligible clients who are not filing or not currently using VITA
2. To use technology and automation to increase the efficiency and capacity of VITA services.

Shared Principles

- Focus on learning - this is an early pilot, so we are looking for flexible partners who can think on their feet, and adapt as we learn more.
- Serve everyone with dignity and respect.
- Help all EITC-eligible clients. If a client appears eligible for EITC but is ineligible for VITA services, Code for America will find another organization to help prep the return.
- Protect the privacy of clients and ensure an audit trail to verify secure practices.
- Ensure a high-quality tax return.

VITA Site Staffing Needed

- 1 Primary contact to interface with Code for America, responsible for ensuring all site staff are appropriately trained, and any issues are shared immediately with Code for America staff.
- Site coordinator for the hub that will be doing tax prep (could be the same person as Primary Contact).
- 1 Customer Support Advocate to assist with live chat and text support, typically answering only basic tax questions - VITA certification preferred but not required.
- 1 Intake Specialist to manage client flow, conduct phone screens, and check to ensure clients are ready for prep - VITA certification required.
- VITA certified-volunteers to assist with intake interviews via phone.
- VITA-certified tax preparers to prepare tax returns and engage with clients via text, email, and phone as needed.

Risks

There are some potential risks to scaling a new service quickly. Potential VITA partners should be aware that we could run into unanticipated bottlenecks or bugs that need to be resolved, which could cause us to temporarily suspend the service. That said, given our organization’s experience scaling technology in the social impact space, we are confident that our service will remain secure, and that we will be able to resolve any unexpected issues quickly. We are looking for partners that are able to adapt with us as GetYourRefund evolves. We also expect each site to join our Slack group to share information and support one another through any changes.
Roles and Responsibilities

Code for America’s Responsibilities

- Ensure that any systems that carry client’s personal information are built with strong security and audit logging, using the NIST 800-53 Moderate Baseline security standard as guidance.
- Ensure the electronic interfaces meet accessibility standards using the WCAG AA standards as guidance.
- Ensure that any staff or volunteers accessing client information are trained in role-appropriate security practices.
- Build interfaces that make it easy for clients to access VITA help at any time.
- Create an intake system that helps clients prepare their documentation so that VITA preparers can help them.
- Ensure that any intake system also collects sufficient information to fill out Form 13614 to the satisfaction of VITA providers.
- Facilitate secure methods of communication between clients and VITA preparers
- Provide a way for VITA providers to schedule interviews with clients.
- Conduct digital outreach campaigns in order to secure new clients.
- Produce outreach materials to share with community partners.
- Conduct ongoing user testing and iterate on systems frequently in response to the needs of both clients and VITA preparers.
- Provide a mechanism to notify VITA providers as soon as a client appears ready for tax preparation assistance.
- Provide a system for VITA providers to send prepared tax returns to clients and to request electronic signatures for 8879 (authorization to e-file)

VITA Provider Responsibilities

- Respond to tax-related chat questions within 72 hours.
- Review incoming client cases within 72 hours.
- Commit to preparing up to a certain number of tax returns, as listed below for each organization.
  - The tax returns may be from tax years 2016-2019.
  - The returns may be prepared anytime between November 2019 through June 2020.
  - Follow all of the IRS Quality Site Requirements¹, such as
    - Review intake materials and reach out to clients with additional questions as needed.
    - Conduct quality review of tax returns.
    - Send clients electronic copies of their prepared tax returns.
    - Schedule required phone call with client to review tax return.
    - Send requests to clients for signatures for authorization to e-file.

¹ Page 16 in Publication 4012, and Publication 5166
Roles and Responsibilities

**VITA Provider Responsibilities (Continued)**

- E-file client tax returns whenever possible. If not able to e-file, put together a paper filing packet for the client.
- Provide ongoing feedback to Code for America.
- Participate in the Code for America Slack channel to share best practices across sites.
- Assist in tracking key pilot performance metrics: dollars refunded to each client, and whether each client qualified for EITC.
- Commitment to following security trainings and security practices provided by Code for America.
- Can refuse to prepare any return if they don’t have capacity, sufficient training for the case, or sufficient information from the taxpayer.
- Provide intake queue monitoring and support ex. monitor incoming client communications and ensure that relevant volunteers are notified on incoming returns.
- Review the process with their local SPEC relationship manager through sharing our GetYourRefund.org SPEC proposal.

FAQ

**Q: How easy is the online process for tax filers?**

GetYourRefund is available for mobile phones, tablets, and desktops. We have found most filers are able to complete the questions and get through the intake relatively easily. However, we do see filers dropping off at the beginning of the process when they verify their identity. We are working with an identity verification provider that meets strict security guidelines and has stringent rules for how to verify identity online, so many tax filers are not able to verify their identity. We are aware of this limitation and are working on a way to increase the number of filers that can verify their identity, while still adhering to the IRS online identity verification guidelines.

**Q: What does the training process look like?**

Once your site has agreed to partner with us, we will schedule a Zendesk training via webinar. You can also see some of our initial training materials [here](#).

**Q: Are there any eligibility requirements outside of VITA’s eligibility requirements?**

We currently can only verify filers with social security numbers, and cannot verify ITIN's at this time. We are working to provide a solution to ITIN holders in the near future.

**Q: What can I share with SPEC and what has already been shared?**

IRS SPEC is aware of the pilot, but we ask that each partner site share the process in the GetYourRefund.org SPEC proposal with their local SPEC contact.
Q: Can we share the link to GetYourRefund?

We ask that you communicate with us before sharing the link broadly with potential clients, so that we can be prepared for an increase in clients on the website. We will provide you with a unique link to GetYourRefund that will allow both our organizations to track how well we are serving taxfilers who use your link.

Q: What happens if more clients visit GetYourRefund than we have the capacity to handle?

We will be watching intake numbers closely to ensure that we do not overload our VITA partners with more clients than they can handle. We are able to turn off digital intake at the website as needed, instead referring clients to other online or in-person services.

Q: Can I limit my site’s participation in GetYourRefund to my geographic area?

Through GetYourRefund.org, sites can opt into preparing returns from anywhere in the country, depending on their capacity to handle out-of-state returns. We strongly encourage partner sites to accept returns from as many states as possible (for example, all sites should be able to prepare returns from states that only have federal returns). This practice helps us serve clients efficiently from across the country, and helps us balance out client demand across all of our partner sites. However, we are able to limit the clients by state if needed.

Q: Is GetYourRefund available in any other languages?

Unfortunately, the site is only available in English at this time.

Q: How will returns be attributed to VITA sites for IRS credit?

Our expectation is that the provider that prepares the tax return should receive credit for that return. All returns will be submitted through your normal TaxSlayer process, which we expect should be attributed to your site per the usual process. We have reached out to SPEC to confirm that this is the case.

Q: Can I use multiple TaxSlayer logins to submit the returns?

You may use whatever TaxSlayer setup works best for you and your team.

Q: What does it cost to participate?

Our goal is to provide GetYourRefund free of charge to all pilot sites, and we have been fortunate to obtain philanthropic funding to support our work thus far. To stay within our budget, we will limit the number of Zendesk licenses available to each site. If more sites would like to participate than we have budgeted for, we may have to ask new sites to pay for their own Zendesk licenses.