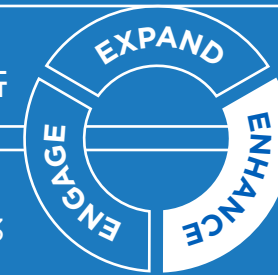


VITA PORTAL

SERVICE SCENARIO [DRAFT] v.1
PROTOTYPING PHASE, MAY 29, 2015

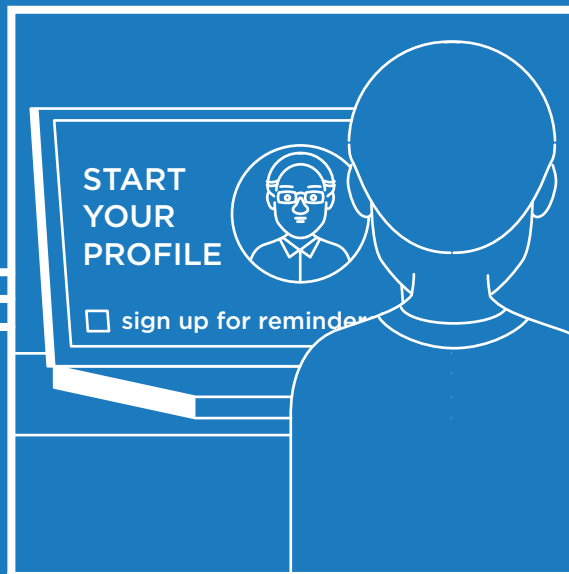
DESIGNING FOR FINANCIAL EMPOWERMENT



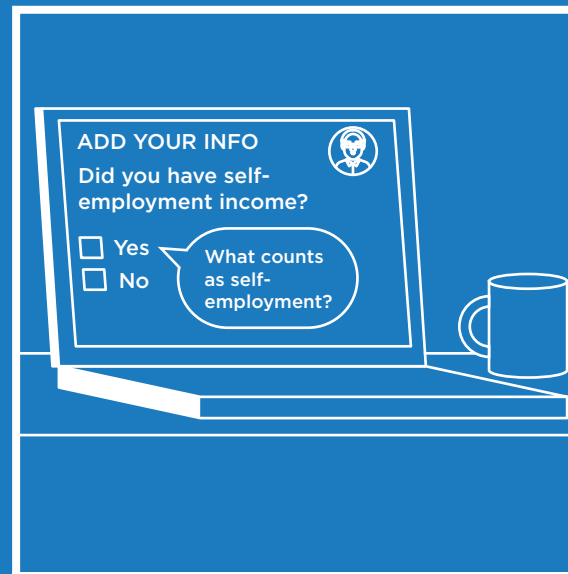
PROTOTYPING CONCEPT 1 of 3



1 Eligible filers can access the VITA Portal from various points of entry: PC, mobile, or any designated VITA location.



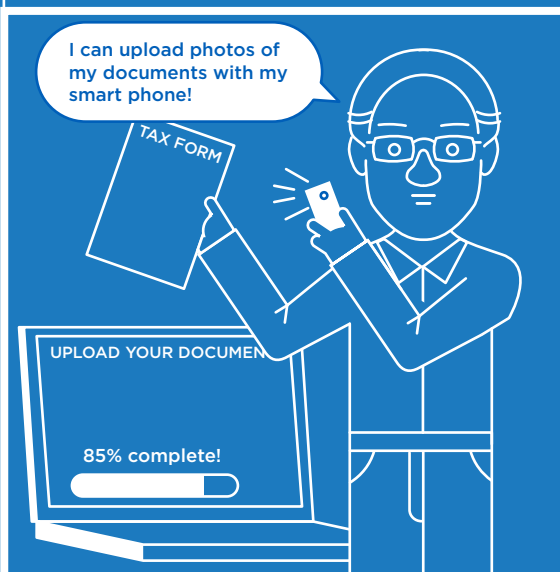
2 The filer creates a profile, (comprised of basic tax data) and chooses whether to receive reminders for the service



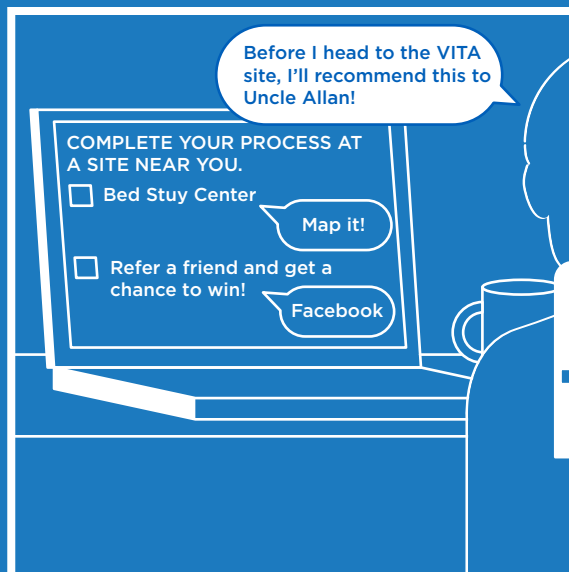
3 At tax time, the filer answers VITA intake questions, with options to see tips/explanations for further clarification.



4 The VITA Portal creates a personalized list of the necessary documents for the filer, printable on demand.



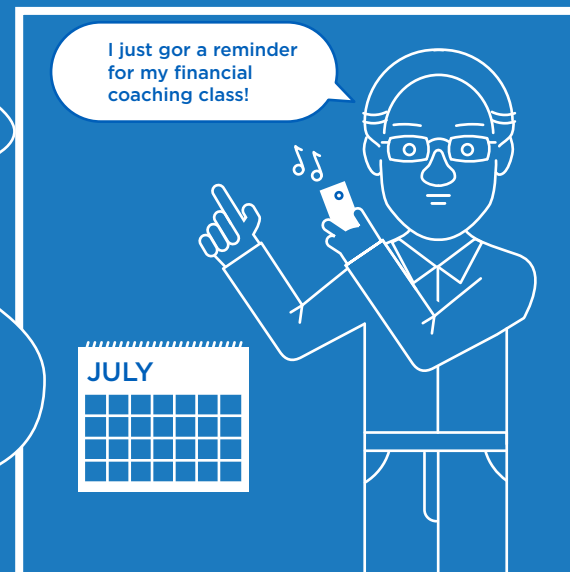
5 Filer uploads documents using a scanner, smart phone or camera. The status bar shows the filer's progress.



6 Filers then get VITA location suggestions, as well as incentivized opportunities to refer friends to the program.



7 Filers travel to the VITA site to complete their process, with the intake complete, speeding up the job.



8 Later in the year, filers who opted to get reminders are sent information on services like financial coaching classes.

SERVICE BENEFITS:

- Make VITA intake process more convenient and less error prone
- Allow filers to confidently and efficiently collect and supply their required tax documents
- Ease burden on VITA sites
- Enable a digital refer-a-friend program (likely via Facebook)
- Connect filers to additional financial empowerment services
- Leverage filers' technology to reduce VITA site resource strain