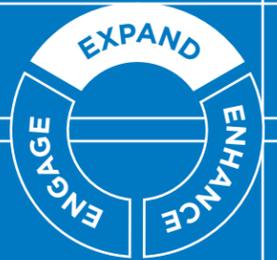


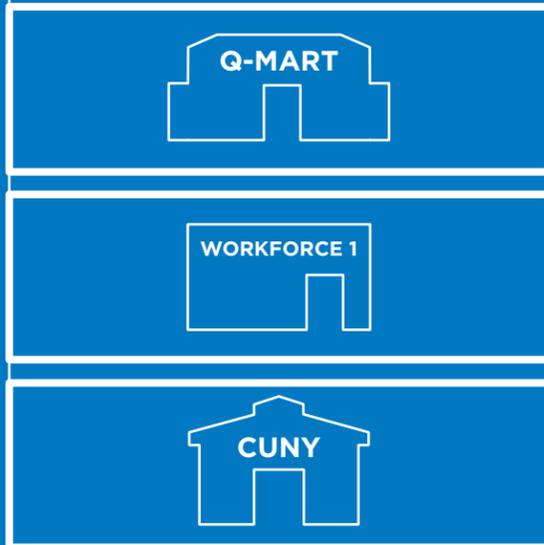
EMPLOYER VITA

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

DESIGNING FOR FINANCIAL EMPOWERMENT



PROTOTYPING CONCEPT 2 of 3



1 VITA providers partner with employers, schools, and/or workforce development centers serving low-income workers.



2 HR staff at the participating employer take the online course to be certified as VITA intake personnel (not preparers).



3 Provider visits the employer to install VITA intake portals and ensure that the site is fully operational and IRS compliant.



4 Before tax time, employer informs employees that free tax preparation will be available during certain times at work.



5 During their shift or a break, employees complete intake via the VITA portal and confirm their ID with certified HR staff.



6 Employees can wait for the provider to make scheduled visits to complete intake and answer questions in person.



7 After their tax returns have been prepared (off site), employees receive a quality review call from the provider.



8 Once they are satisfied that their return is accurate and complete, employees sign and e-file via VITA portal (or paper).

SERVICE BENEFITS:

- Make VITA more convenient for filers with busy work schedules
- Engage filers where and when they get their tax documents
- Provide employers with a free benefit to offer their employees
- Discourage employers from referring to paid tax preparers
- Expand VITA capacity & reach by distributing intake process
- Increase awareness of VITA by providing it in new locations