

**2015 TAX YEAR
VITA PORTAL SERVICE BLUEPRINT - PILOT**

This service blueprint outlines the chronological steps of the VITA Portal service from three critical perspectives; the tax filer, the tax preparer/organization, and the coordinating city agency.



PRE SEASON

VITA PORTAL: REGISTRATION

	TAX FILER	Learns about free tax preparation services in NYC (and prize lottery for registering) from a friend	Goes to freeprep.nyc.gov to review offerings, procedures, and possible prizes for registering	Decides there is nothing to lose and registers by entering their name, address, and contact info	Chooses from a selection of lottery prizes they could win for registering or referring others	Enters name(s) and contact info of friend who referred them and anyone else they want to refer	Agrees to terms, submits registration, and is invited to share the service on social media	Receives confirmation text, welcoming them to the service, and outlining potential next steps
	TOUCH POINTS	Advertising/word of mouth	VITA Portal web site				Test message	
	TAX PREPARER							
	CITY OF NEW YORK	Promotes www.freeprep.nyc.gov (and lottery prizes for registering)	Hosts and updates this web portal as a New York City public service	Maintains database of names, addresses, and contact info	Secures donations of gift cards, sports tickets, and other prizes	Reenters filer in the prize lottery every time they sign someone up	Enforces IRS policies about filer's eligibility, rights, and data security	Automatically sends confirmation emails to filers who register

TAX SEASON

VITA PORTAL: REGISTRATION

VITA PORTAL: INTAKE

	TAX FILER	Receives a text message inviting them to select a free tax preparer from a map of nearby locations	Selects a preparer and receives another text with instructions about compiling tax documents	Comes in and has their taxes prepared (or receives a reminder text inviting them to come in)	If using Virtual or on-site VITA, they can complete the intake form and upload tax documents	After their taxes are prepared offsite, they receive a text about their Quality Review call or visit	Upon authorization, their identity is confirmed by a certified staff member or visiting provider	After return is filed, and they can elect to receive texts about other financial services during the year
	TOUCH POINTS	Text message and VITA Portal web site		VITA Site (or Text message)	VITA Portal web site	Text message and in-person visit or phone call		Test message
	TAX PREPARER		Receives filer info (and schedules appointment, if necessary)	Prepares filer's return and reports that filer has been served	Reviews filer's intake form and tax documents and does their return	Texts filer and then calls or visits them to complete Quality Review	Confirms filer's identity through an in-person visit or on-site partner	Submits filer's complete return and stays in touch via text
	CITY OF NEW YORK	Automatically sends text at tax time and updates preparer map	Automatically sends filer info to their free tax preparer of choice	(Automatically sends reminder text, if filer has not been served)				Send filer a confirmation text and invites them to try other services