

GetYourRefund.org



Rae Pilarski

Associate Program Director, GetYourRefund
Code for America

Topics

About Code for America

About GetYourRefund

Case Management System – The Hub

The Future of GetYourRefund

Common Questions

How to Partner with GetYourRefund

Q&A

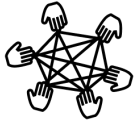
Code for America believes in the possibility of a people-centered government

- Build equitable systems
- Put people first
- Empower for action
- Inform with evidence
- Improve continuously

Our goal

A resilient government that
effectively and equitably
serves all Americans

Code for America Programs



Strengthening the
**Social Safety
Net**

[GetCalFresh](#) | [SNAP](#) | [WIC](#) | [Integrated Benefits](#)



Promoting economic justice
through
Tax Benefits

[GetYourRefund](#) | [GetCTC](#)



Shrinking the
**Criminal Legal
System**

[ClearMyRecord](#) | [National Automatic Record Clearance](#)



Mobilizing a
National Network

[85+ Brigade Volunteer Network](#) | [National Day of Civic Hacking](#)

Promoting economic justice through tax benefits



Product



Tiffany Chang
Senior Product Manager

Qual Research



taranamol kaur
Sr. Qual Researcher



Claire Sadeghzadeh
Sr. Qual UX
Researcher

Engineering



Jey Flores
Director of Engineering



Martha Pidcock
Senior Software
Engineer



Jenny Heath
Senior Software
Engineer

Client Success



Andrew Xie
Client Success Manager



Julissa Tapia
Client Success Lead



Annie Lo
Client Success
Advocate

Data Science



Max Hell
Senior Data Scientist

Design



Anu Murthy
Design Manager



Jor Arcila
Associate UX
Designer



Tim O'Farrell
Software Engineer



Mike Rotondo
Solutions Engineer

Program



Anthony Silverman
Senior Program Director



Gabriel Zucker
Program Director, Tax Policy
and Partnerships



Rae Pilarski
Associate Program Director,
GetYourRefund



Courtney O'Reilly
Senior Program Manager



Erica Miller
Organizer



Jazmin Estrada
GYR Partner Support
Specialist



Sasha Prell
Tax Benefits Screener

Our north star

Closing the tax benefits
participation gap

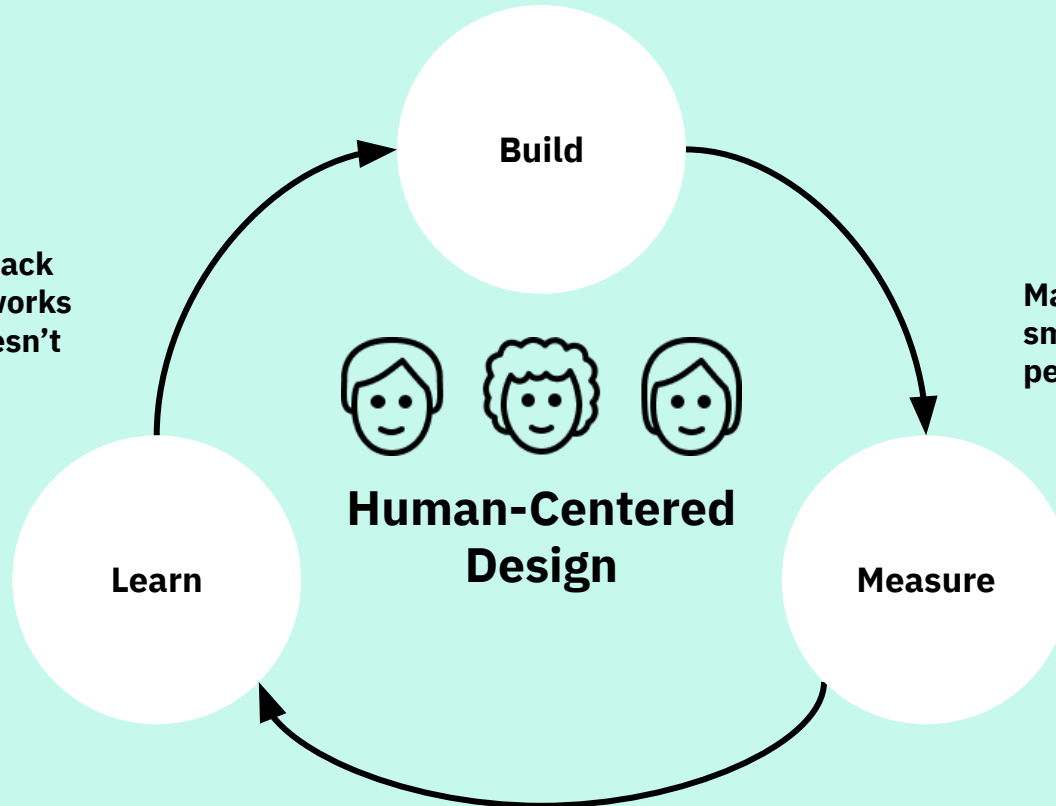
Why don't eligible people file?

- They don't think they have to file their taxes.
- Emotional hardship interrupted their life.
- They are overwhelmed by trying to understand the ambiguous consequences of filing.
- Trustworthy, affordable help is hard to find.
- Help isn't available where they are, when they need it.


Outreach alone is not enough to overcome these challenges



**Collect feedback
about what works
and what doesn't**



**Make something
small to meet
people's needs**



**Observe people using
what you made**

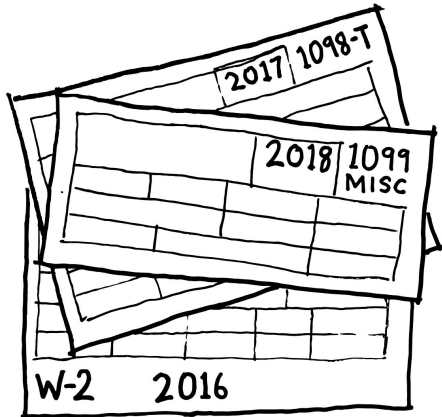
Free &
Trustworthy



Clarifying

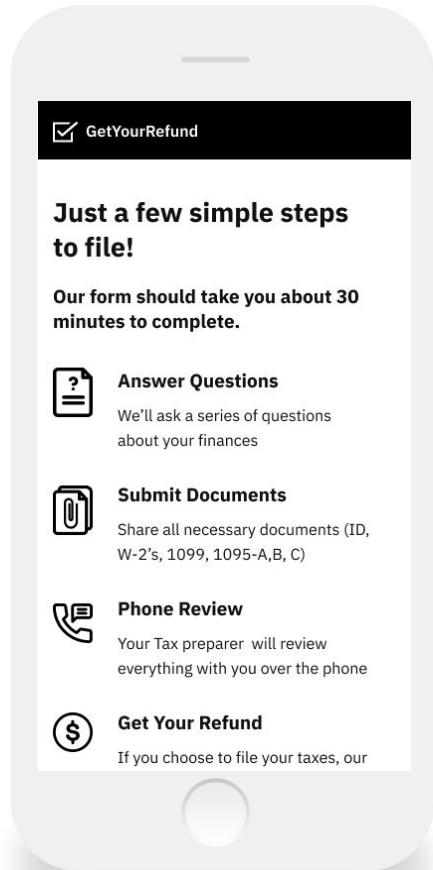
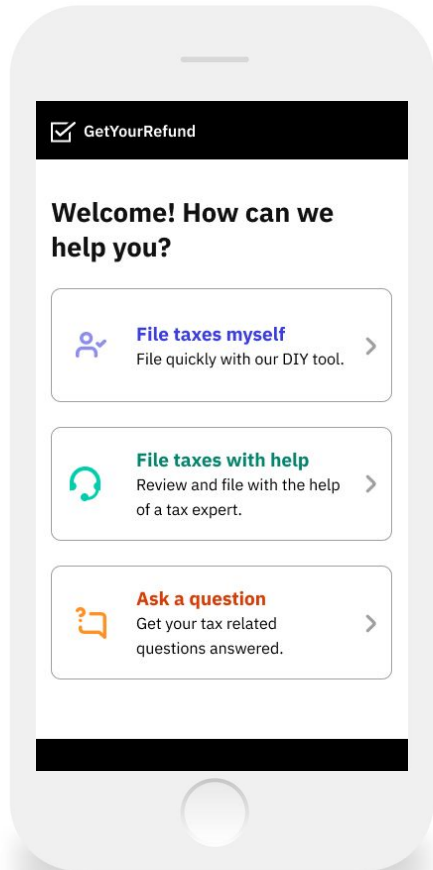
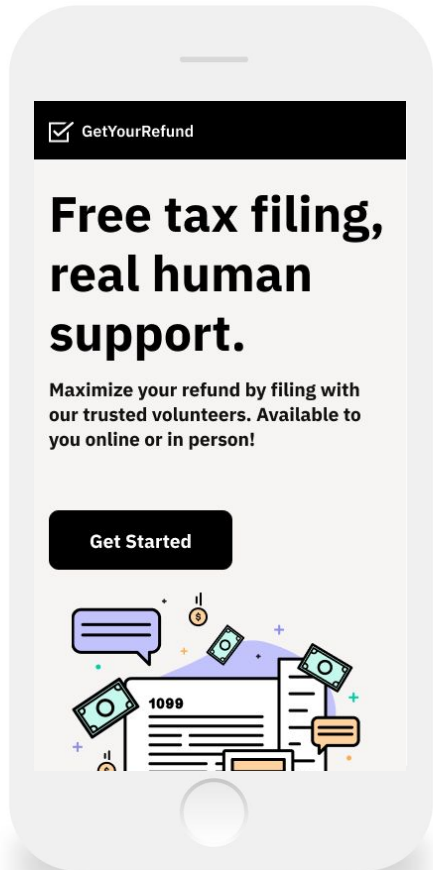


Thorough



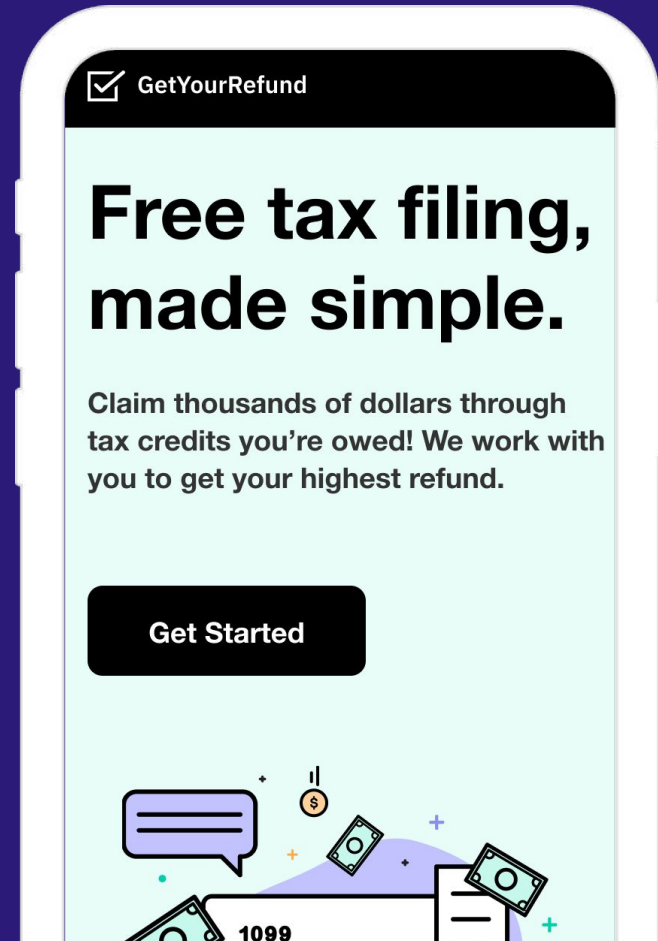
Accessible
whenever,
wherever





GetYourRefund

Collaborating with VITA to provide high quality tax prep to low-income families nationwide



A range of services to meet client needs



VITA Location Finder

Help clients connect to in-person VITA sites near them



File with Help: Drop-off

Provide an easy way for VITA sites to manage in-person services efficiently



File with Help: Full Service

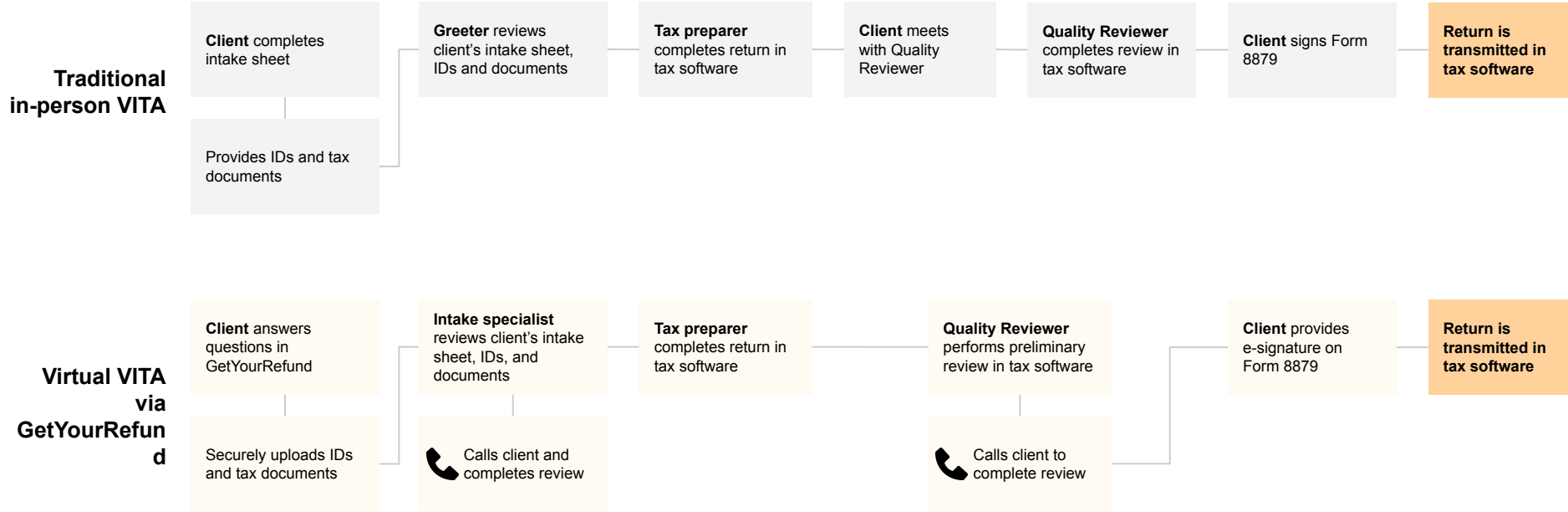
Support fully virtual end-to-end VITA at [GetYourRefund.org](https://www.getyourrefund.org)



File Myself

Provide chat support to clients using TaxSlayer FSA software

Comparing Traditional VITA and GetYourRefund



“

I think all of the work everyone has done to build such a beautiful and user-friendly platform really allows us to help people in such a dignified way!

We absolutely love sharing such a high quality product with clients that works well, is easy to navigate, and is fun to look at.

”

- Colleen Smallfield, Former Director of United Way Bay Area VITA

The Hub

Built *for* and *by* VITA

The screenshot displays a user interface for a client profile. On the left is a dark sidebar titled "The Hub" with navigation options: "All Clients", "My Clients", "My Updates" (with a blue dot), "Tools", "Rae Pilarski" (with a profile icon), and "Sign out" (with an arrow icon). The main content area has a top navigation bar with tabs for "Client Profile", "Messages", "Documents", and "Notes". The "Messages" tab is active, showing a message history for "2/1/2024".

At the top of the message list, there is a status indicator: **Automated to jdw** with a green checkmark.

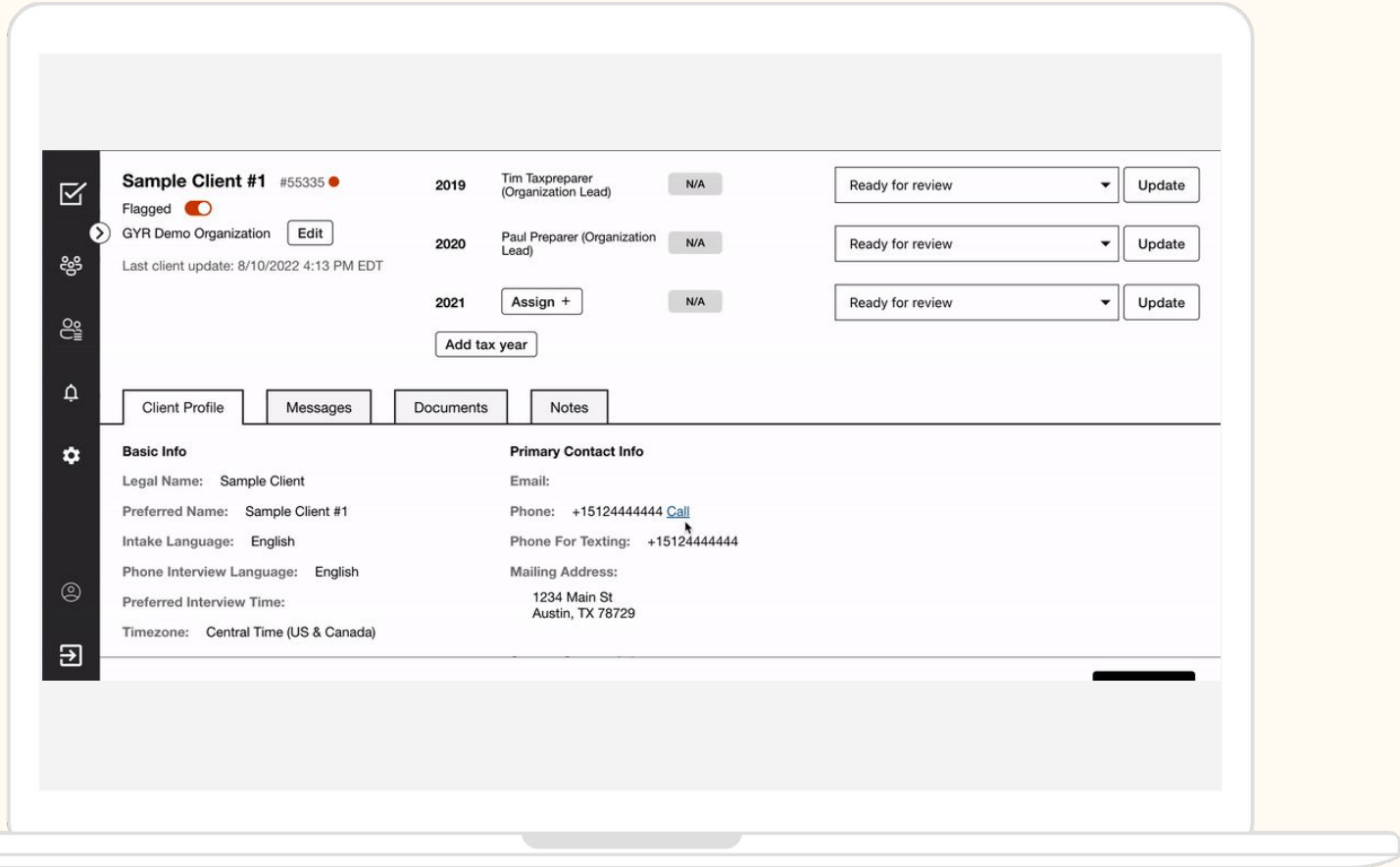
The first message is dated "2/1/2024 8:07 PM EST" with the subject "Subj: Your tax document reminder". The body text reads: "Hello Jay, We received your request for a reminder. Please [login here](#) to upload Photo ID documents. Your tax team at GetYourRefund".

The second message is dated "2/1/2024 8:10 PM EST" with the subject "Subj: Your tax document reminder". The body text reads: "Hello Jay, We received your request for a reminder. Please [login here](#) to upload Health Insurance documents. Your tax team at GetYourRefund".

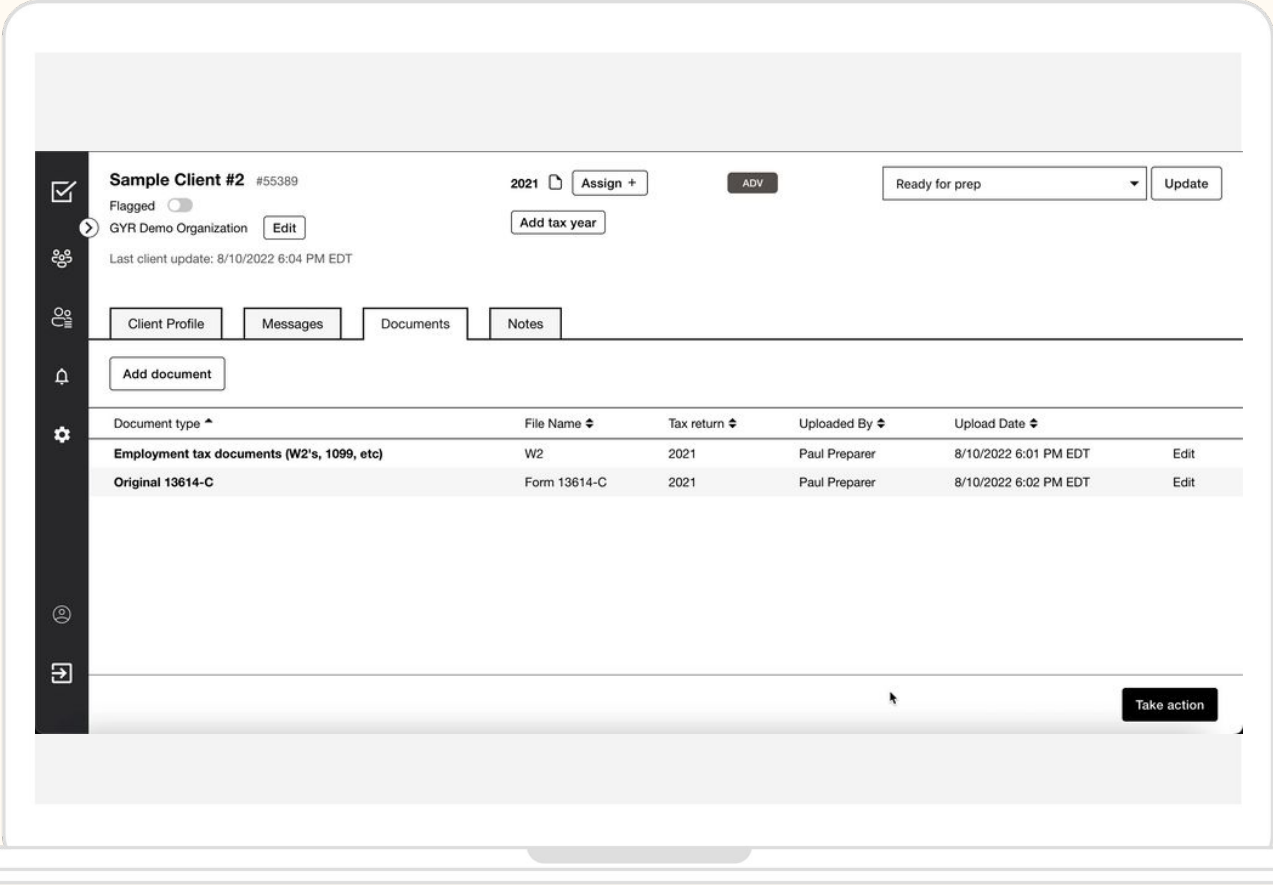
Below the messages, there is an "Automated" section with a message dated "2/1/2024 8:11 PM EST" stating "Client added 3 documents.".

At the bottom right of the interface, there is a black button labeled "Take action".

Communicate with clients via call, text, and email



Preview, edit, and archive documents



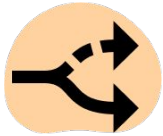
The future of GYR

The future of GetYourRefund

- Continued support of virtual VITA
- Launching for our **6th** season in 2025
- Productizing manual tasks in the Hub

Common questions

Common questions



Can I serve my regular VITA clients?

Yes! We provide unique URLs that will send clients directly to your site - but partners using virtual VITA must also serve clients from anywhere in their state.



Who gets credit?

VITA partners use their own software - returns are filed using EFINs and SIDNs issued by IRS SPEC.



Is GetYourRefund SPEC-approved?

Yes! We work closely with National SPEC to ensure that GetYourRefund adheres to SPEC standards.



Is the system complicated?

Our custom case management system, the Hub, was built specifically for VITA and VITA volunteers.



Is GetYourRefund secure?

We take security very seriously and have safeguards in place.

Safeguarding client data



End-to-end Encryption

GetYourRefund does not permit any network connections without strong encryption protocols.



Secure, isolated infrastructure

Taxpayer information is stored in an encrypted database that is protected from external networks.

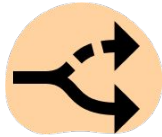


Industry best practices

We are targeting compliance with ISO-27001 and SOC 2 security standards, which include regular threat modeling, penetration testing, and incident response protocols.

How to partner with GYR

What we are looking for in new partners



Interest in reaching new clients in the EITC participation gap by expanding geographic reach



Capacity to prepare 200+ returns (can create a coalition with other sites to reach this goal)



Willingness to experiment, provide feedback, adapt to evolving service model and technology



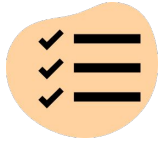
Interest in collaborating with GetYourRefund long-term

We provide the GetYourRefund website, case management system with e-sign feature, Slack, and related training at no cost to VITA partners.

How to apply for GetYourRefund 2025



Visit our application website at c4a.me/join-gyr



Read through the applicant resources



Decide whether to apply as a single organization or with a coalition



Complete the application



Wait to hear from us within 2-3 weeks

What strengthens an application?

- Applying as a coalition
- Serving a large area (e.g. entire state)
- Ability to serve a variety of clients – e.g. 1040NR, Married Filing Separately
- Service offerings for hard-to-reach populations
- Ability to serve clients in several languages

Thank you!



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