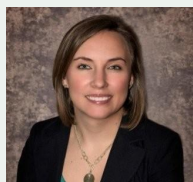


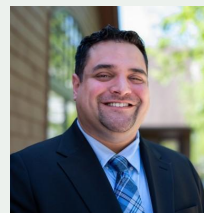


2026 RAISE Texas VITA Conference

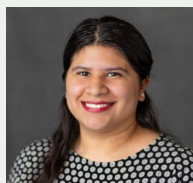
Expanding Service Delivery: Intake-Only and Virtual Services



Moderator: Stephanie Mace
Associate State Director, Advocacy & Outreach
AARP Texas



Juan Berrios, Executive Director
SimplifyCT



Leslie Nunez, VITA Program Coordinator
United Way of Southern Cameron County



Sheila Anderson-Ruth, Senior Management Analyst and VITA Program Manager,
City of San Antonio



UNITED WAY
Southern
Cameron County

V.I.T.A.
VOLUNTEER INCOME
TAX ASSISTANCE

☐ Texas Southmost College ECC

Drop-off



11 sites

- 6 high schools
- 3 community organizations
- 2 local college/univ

196 volunteers

4,772

Returns Files
E-file and Paper

Procedure

- Check-in under the 'Walk-in' sign-in sheet
 - Depending on volunteer capacity we let them know if they can be taken in as a walk-in or drop-off.
 - It all depends on how fast we are working in the back workshop.
- Sign form 14446
- Must have all documents printed
- We do not print out tax forms for clients
- Make copies of **only** SSN Cards, IDs & occasionally IP Pin Letter
 - Keep copy of last year's return (if prepared at a VITA site)
- No specific time given
 - "The tp/qr will call you if they have any questions, otherwise the receptionist will call you to come sign."
- The site coordinator will review the return with client and have them sign the 8879



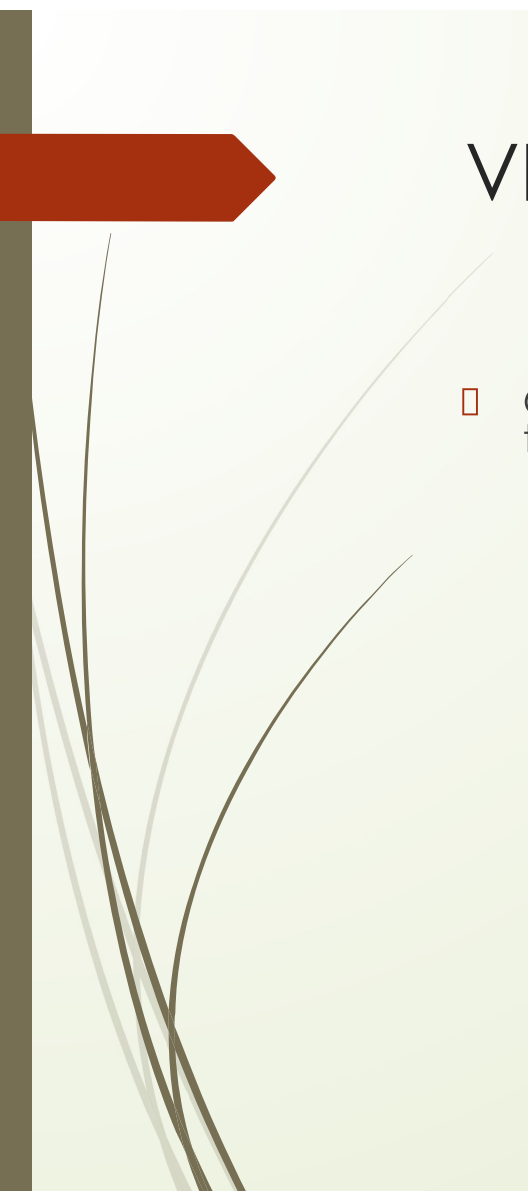






VITA San Antonio Tax Preparation Models

September 22, 2026



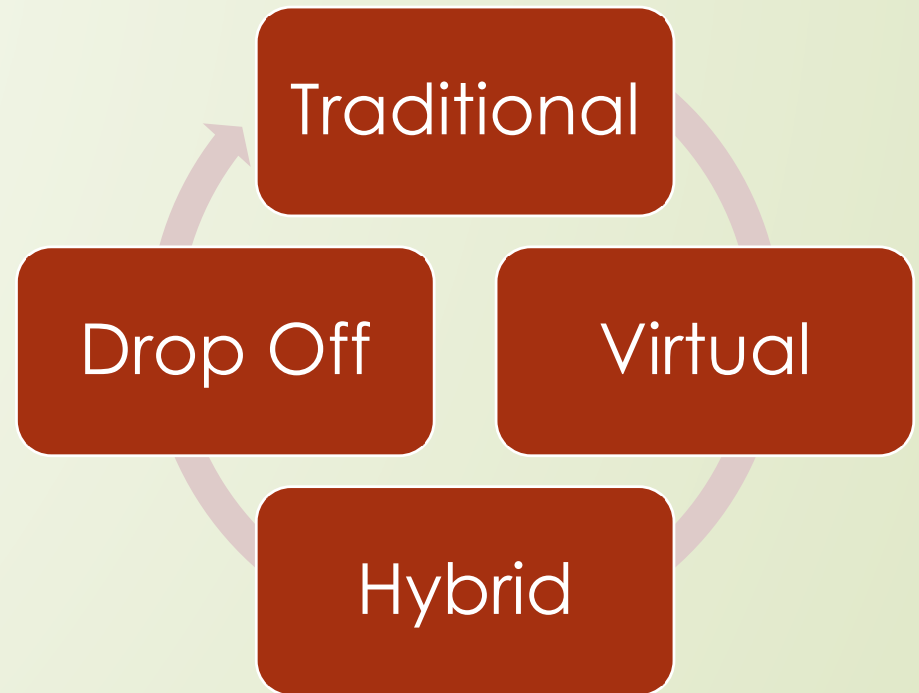
VITA San Antonio Models

- Our income tax services are modeled to fit the needs of the taxpayer to ensure they have a pleasant experience. Our models are:
 - Traditional- Taxpayer frequents a site location, signs in completes the 13614-C Intake form and waits to be called
 - Drop off- taxpayer completes 13614-C it is reviewed, contact information is given, tax return is complete within 72 hours. Taxpayer is called given a time and date when to arrive to review tax return.
 - Virtual- taxpayer can enter information and complete form 13614-C onto the TaxSlayer portal or use the email VITA@sanantonio.gov
 - Hybrid- A combination of the models presented. This model is increasing because it allows best for work schedule, and they feel more comfortable having the flexibility.

***** Our program is paperless, Once tax return is electronically filed, the 13614-C is shredded******

Examples of Scenarios

1. Taxpayer may begin using the Traditional model but discovers more information is required, so they choose to revert to Drop Off model (**Traditional/Drop off**)
2. Taxpayer request **Virtual** model sends in information but later decides they want to come in person to review tax return (**Traditional/Virtual**)
3. Taxpayer requested virtual the model but later discovers they need an additional transcript from the IRS. They emailed the transcript. Later they forgot to add a dependent and wanted to make the change in person. (**Virtual/drop off/ Traditional**)



Models Estimated Processing Times



of Tax Returns completed

Site Location	Total #of Tax Returns	# of Hybrid Tax Returns	# of Drop off returns	# of Virtual Tax Returns	# of Traditional Returns
Claude Black	2709	23	83		2606
Guadalupe Ctr	3613		3613		
Henry Guerra	2164				2164
IGO Library	1978	260	1614	48	56
Presa Ctr	729		729		
Palo Alto College	2940	1718	1155		64
St. Mary's Univ	744	604	140		
St. Philip's College	6491	4416	202	487	1386
Neighborhood Place	2400		2400		
Thousand Oaks Library	2480				2480
Willie Velasquez	2618	1906		369	343
Hill Country Ctr.	459				459
GCC mobile	303				303
Total Transmitted	29,628	8,927	9,936	904	9,861

Expanding Service Delivery

Intake-Only and Virtual VITA Services

Practical lessons from SimplifyCT's hybrid service model

Juan Berrios
Executive Director, SimplifyCT

2026 VITA Conference, Austin, Texas, September 22, 2026



SimplifyCT
Serving CT Families

SimplifyCT (SCT) helps Connecticut's low-to-moderate-income and at-risk residents navigate the complex process of accessing social safety-net benefits. Our mission is to unlock access to vital benefits and empower low-to-moderate-income individuals and families to build income, grow assets, and achieve lasting financial stability.

SimplifyCT's Hybrid VITA Program



Scale and a strong quality system allow one program to support several service pathways

14,307

RETURNS PREPARED

\$19.5M

REFUNDS RETURNED

5,000+

VIRTUAL RETURNS

163

VOLUNTEERS

13

IN-PERSON SITES

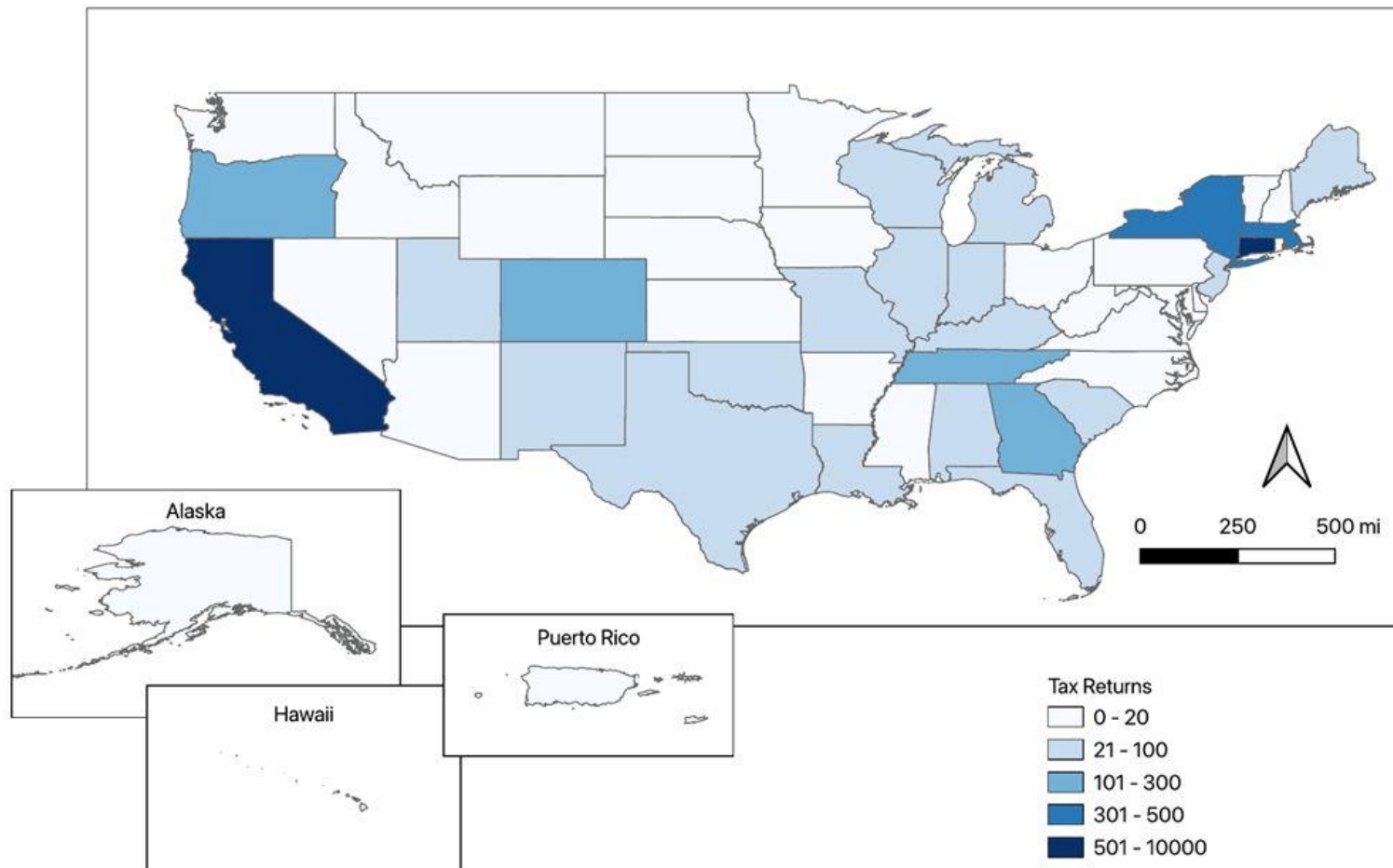
IN-PERSON SERVICE

A statewide site network offers scheduled and community-based tax preparation across Connecticut.

VIRTUAL SERVICE

GetYourRefund connects taxpayers to trained volunteers nationwide while SimplifyCT manages intake, preparation, review and filing.

Clients Served by Simplify CT in the TY2025 Tax Season



One Program, Multiple Entry Points

Partners can choose the part of the workflow they are equipped to own

1

FULL-SERVICE SITE

Traditional VITA services. Taxpayers schedule appointments through our 24/7 appointment system and sits face to face with a volunteer who prepares their return.

2

FULLY VIRTUAL

Taxpayers upload documents and communicate through GetYourRefund. Volunteers prepare returns virtually.

3

NAVIGATOR SUPPORT

A trusted partner is trained to gather documents upload to GetYourRefund. Volunteers continue the process virtually.

4

FILEMYSELF

Taxpayers complete their return on their own through TaxSlayer FSA either on SCT's website or through GYR. SCT's Call Center is available to support and provide technical assistance.

SCT was founded in 2020 to bridge technology with human connection offering both traditional in-person and virtual services to close service gaps. Today, SCT is one of the largest providers of VITA in Connecticut and one of the nation's largest provider of Virtual VITA services.

The Virtual VITA Workflow

Every ticket has a clear owner, status and next action

1

CLIENT INTAKE

Taxpayer completes intake and uploads documents in GetYourRefund.

2

TRIAGE

Dedicated Intake/Triage staff confirm identity, consent and required documents. Triage covers most intake communications.

3

TAX PREPARATION

A preparer completes the return in TaxSlayer and communicates through GYR.

4

QUALITY REVIEW

A second certified volunteer reviews the return and corrects issues. This is typically conducted by what we call a "Mentor"

5

CLIENT REVIEW

The taxpayer receives refund or balance details, reviews the return and signs.

6

E-FILE

The quality reviewer files the return and confirms acceptance.

Client Communication Reduces Rework

We replaced generic platform messages with clear, bilingual instructions

Hello <<Client.PreferredName>>,

Your <<TaxReturn.TaxYear>> return is complete and ready for your signature.

You have a federal refund of: \$ (or amount owed of: -\$) and a state refund of: \$ (or amount owed of: -\$).

Please log in to GYR: <https://www.getyourrefund.org/en/portal/login> and click "download final tax papers" to review your return. Make sure all information, especially your banking details, is accurate. Then click "Add final signature".

We prepared your return based on the information you provided. Please review it carefully, as you are responsible for the accuracy of your return.

If you agree, reply with the last 4 digits of your SSN or ITIN so we can verify your identity and file your return

If you wish to receive a call, you can let us know. Otherwise, feel free to text us any questions.

<<Preparer.FirstName>> at GetYourRefund

WHAT CHANGED

- SimplifyCT uses some of GYR's standardized messaging. We also have a Volunteer Resource Guide where we have custom built messages or "Macros"
- This is to facilitate further conversations via text and email with customers such as:
 - Requesting missing documents through one secure message with upload instructions.
 - State federal and state refund or balance-due amounts in the signature message.
- Offer a phone review when requested while keeping routine communication in the portal.

Customers choose Virtual Tax Preparation to ease the overall process. The more we communicate without requiring their presence, the more responsive they become.

Mentorship Model

Communication and Structure during Virtual Tax Prep is KEY!



1 MENTOR = QUALITY REVIEWER

SUPPORTS 4-5 PREPARERS

- SCT recruits experienced volunteers who serve as Volunteer Mentors. These Mentors are responsible for individual 4-5 person teams.
- Slack provides volunteers with easy access to communications.
- Adult preparers certify at the Advanced level.
- Virtual volunteers complete at least five returns per week during filing season.
- Every return receives an independent quality review before filing.
- There is always a SCT Site Coordinator managing Virtual Tax Prep 7 days a week.

High School Service Learning through VITA

Since 2009, Connecticut students have built financial and career skills while providing free tax assistance to their communities.

ABOUT THE PROGRAM

Connecticut high school students have participated in VITA since 2009. New Britain High School was the first to launch the program a comprehensive internship combining financial literacy, tax preparation training, and supervised service.

HOW STUDENTS LEARN

Classroom Preparation

Students train in tax law, software, customer service, and the needs of low-income taxpayers.

80+

STUDENTS ACROSS
CENTRAL CT SCHOOLS

120

HOUR WORK-BASED
INTERNSHIP

12

HOURS OF FINANCIAL
LITERACY

Supervised Practice

Experienced VITA professionals guide students as they apply their skills to real tax returns.

14

PAID STUDENT
INTERNS

100%

VIRTUAL
PARTICIPATION



Training



Mentoring



Student Cohorts



THE NAF CONNECTION

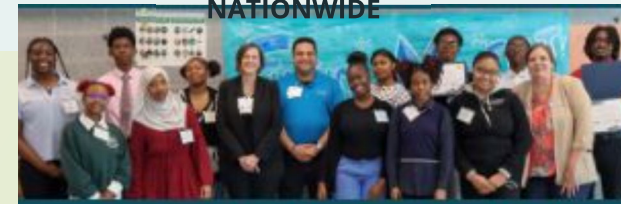
The Academy of Business and Finance recruits students and anchors work-based learning in the classroom. VITA extends that learning beyond school through supervised taxpayer service.

2026 VIRTUAL EXPANSION

SimplifyCT, ReadyCT, and Weaver High School brought the model fully online. Fourteen paid interns completed more than 500 returns nationwide through GetYourRefund.

500+

RETURNS
COMPLETED
NATIONWIDE



2026 WEAVER HIGH SCHOOL COHORT

Virtual Service Depends on Trust and Safeguards

Convenience cannot weaken privacy, ownership or quality control

01

MANAGED EQUIPMENT

Volunteers use laptops configured and managed by SimplifyCT.

02

APPROVED SYSTEMS

Tax documents and client communication remain inside GetYourRefund and TaxSlayer.

03

CLEAR OWNERSHIP

Tickets move directly from preparer to quality reviewer. Active work never sits unassigned.

04

LIMITED IDENTIFIERS

Slack conversations use the client number rather than the taxpayer's name.

05

INDEPENDENT REVIEW

A second certified volunteer checks every return before e-file.

06

MENTORSHIP ASSISTANCE

Staff and senior volunteers remain available when a return or client needs more support.

We keep the queue moving

Some organizations have preparers—but not the administrative capacity to manage every GetYourRefund handoff. SimplifyCT can run that front end for them.

NEW TICKET



IDENTITY + CONSENT



MISSING DOCS



CLIENT FOLLOW-UP



ROUTE / ESCALATE

Triage is operational infrastructure

- Confirm the ticket is usable before it reaches a preparer.
- Reduce time lost to incomplete documents and unanswered requests.
- Apply consistent statuses, messages and escalation rules.
- Give partner organizations visibility without asking them to build a call center.

The quiet work behind scale

**The return only moves when
someone owns the next action.**