Mapping the Future State

A service blueprint of coordinated tax filing supports

This service blueprint was created through a series of workshops in 2021 with staff at Toronto Employment and Social Services, Seniors and Long-term Care, and a community partner. It shows a possible future where tax filing is a coordinated service between a municipality and a community partner.

Prosper Canada

Intake & Assessment

Client Actions

Client connects with TESS worker

New Client
Client completes intake for the first time

Existing Client
Client adjusts existing details with their worker

TESS/SSLTC Actions

Worker uses standardized tax filing **needs assessment** in the course of regular intake, assessing digital skills, tax backlog, and general tax complexity

Community Partner Actions

Partners align on **standardized needs assessment**

Preparation & Hand-off

Client Actions

Indicate location, timing, and modality needs for tax support

Gather necessary documents

Get support in finding documents

TESS/SSLTC Actions

Low Complexity + High Digital Skills
Worker sets up an appointment to walk through NetFile setup

High Complexity or Low Digital Skills
Worker uses spreadsheet to identify services offered in client's area, and calls to book an appointment

High Complexity or Low Digital Skills
Worker finds appointment using cross partner, real-time standardized booking tool

Some Digital Skills/Access
Remote appointments prioritized

No Digital Skills/Access
In-person appointments prioritized

None-standard Hours
Off-hours support brokered

Worker provides **Document Preparation Checklist**

If NFA
TESS office serves as 'mailbox' for physical documents for client

If Required
Worker supports with document scanning, and submits to secure virtual Dropbox

Community Partner Actions

Partners input service locations, timing, and contact info into shared cloud spreadsheet

Partners input service availabilities into **shared booking tool**, and use it to manage appointments

Partner site is notified of booking, along with key triage details: level of complexity, whether or not worker will join the call, and possible barriers to access

Partner accesses scanned documents in secure virtual Dropbox

Service Delivery

Client Actions

Client files their own taxes using NetFile

Client receives tax filing support

TESS/SSLTC Actions

Worker provides guidance on navigating NetFile software, using **Quick Reference Document**

Worker provides transit funds for Client to access clinic

Worker provides access to TESS/SSLTC office computer for remote appointment

Community Partner Actions

Partner provides tax clinic service to high-complexity, high-need, low digital skill clients

Follow Up

Client Actions

Client receives a follow-up in their modality of choice from Community Partner, with option to engage TESS staff

Client accesses benefits

TESS/SSLTC Actions

Worker joins the follow-up conversation, when guiding principles allow and when client has given consent

A **one-stop portal** enables clients to provide 'proof of income' for all income geared city benefits (e.g RGI, FairPass, etc.)

Community Partner Actions

TESS/SSLTC and community partners act from guiding principles for when it is appropriate to involve a TESS/SSLTC worker in follow-on conversations regarding tax filing

Partner follows up on next steps after tax filing, including payment of money owed, as well as other FE conversations

Aspirational Vision

Actions not visible to client

Tools