Many frontline social service agencies provide free tax preparation services by trained empathetic volunteers through the Community Volunteer Income Tax Program (CVITP). CVITP clinics attempt to address a number of barriers to tax filing for eligible people living on low incomes (e.g. costs related to tax filing, low literacy levels, documentation burden, and limited proficiency in English/French etc.). However, many of these clients with simple tax situations are interested in and capable of filing their own taxes.

WoodGreen Community Services, a large multi-service frontline social service agency in Toronto, provides free tax preparation services year-round to people living on low incomes. WoodGreen was interested in designing a novel solution to address the tax filing needs of people who are interested in and capable of filing their own taxes. Specifically, WoodGreen wanted to know...How might we support CVITP clients who have simple tax situations to gain the confidence and skills needed to file their personal income taxes on their own? Prosper Canada and a leading commercial tax preparation software company partnered with WoodGreen, in order to answer this design question.

## Supported **Self-File**

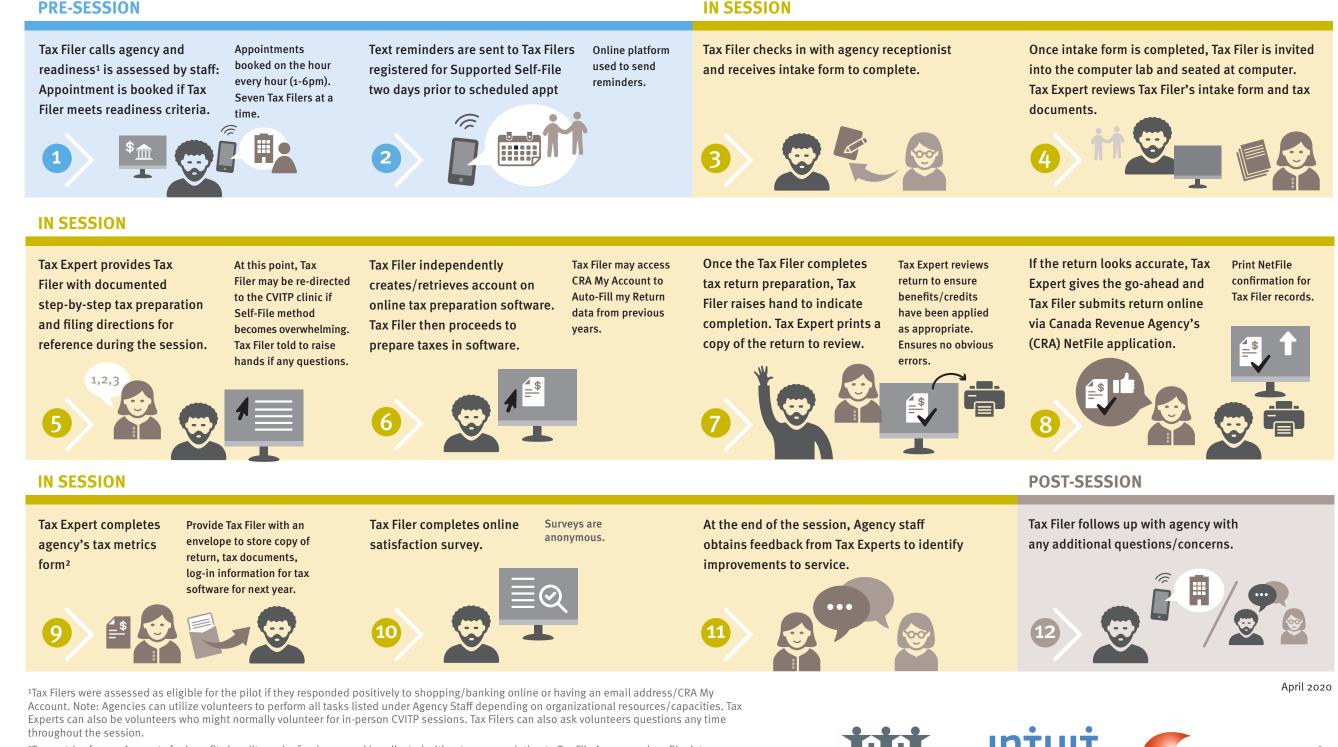
Piloting a new way to empower individuals to file taxes independently

**Design challenge:** Every year during tax time (March/April) WoodGreen struggles to meet the overwhelming demand for their CVITP services. However, many clients have requested supports for learning to file independently. Most clients eligible for CVITP have simple tax situations. To self-file, clients would need access to technology and internet, as well as hold a basic level of digital literacy. With these in place, WoodGreen wanted to build confidence in clients and teach them to file on their own; this would both empower clients and allow CVITP volunteers to serve those for whom self-filing is not an option.

Solution: To offer a space where clients who are comfortable using computers can learn to file their taxes independently with light touch support if and when needed. Clients can use a free version of an online commercial tax preparation software that guides them through the tax return preparation and filing process through a user-friendly approach. Although clients prepare independently, volunteer Tax Experts will be present to answer any questions clients may have and review their return for potential errors or omissions prior to filing.

highlighting pilot insights.

## IN SESSION



<sup>2</sup>Tax metrics form – Amounts for benefits/credits and refunds secured is collected without any association to Tax Filer's personal profile data e.g. name, address, SIN, date of birth etc. This information is tracked by Agency Staff in order to quantify the impact of their tax filing assistance services in the form of tax credit/benefit and refund dollars going back into the community.







## Interested in learning how these pilots unfolded? Stay tuned for a more detailed brief

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