VITA App User Stories

Terms

* Client: member of the public, generally a VITA client; not a volunteer, site coordinator, or admin
* User: a Volunteers, Site Coordinator (SC), or Admin
* Volunteer: a trained and IRS certified eFiler (tax prep)
* Site Coordinator (SC): a duly authorized manager of a Site
* Admin: a duly authorized manager of the VITA app

1. As a Client…

* 1. I would like to be able to use the App without registration or a password
  2. I would like to be able to view a map of all sites using any of the following filters (and in combination)
     1. All sites open: any date, today, tomorrow, or any of the next 6 days
     2. All sites with: DropOff, Express, InPerson, or MFT
  3. I would like to be able to designate 1 or more sites as ‘preferred’
  4. I would like to be able to see my ‘preferred’ sites highlighted on the map
  5. I would like to see the next closest site highlighted if one of my preferred sites is not open on the date I requested
  6. I would like to be able to have my filter preserved across app usages to I don’t have to enter the choices each time I use the app
  7. I would like to be able to touch the flag for a site and see details on that site including address, site capabilities, get directions, and view the site calendar (list of open dates and times)
  8. I would like to know what I should bring to a site
  9. I would like to know about the app: author, privacy rules, etc.
  10. I would like to be able to post a Suggestion

1. As a User…
   1. I would like to enter my credentials (email and password) one time and not have to enter them each time I use the app
   2. I would like to have my password expire in May of every year
   3. Once my credentials are validated, I would like to be take to the screens appropriate for my role (Vol, SC, Admin)
2. As a Volunteer…
   1. I would like to be flagged as a part of the mobile team
   2. Set a filter on the site map to show mobile sites as well as regular sites.
   3. If I am not on the mobile team I do not want to see mobile sites on the map
   4. I would like to opt-in for a notification if one of my preferred sites has a change to the site calendar
   5. If I am flagged as a part of the mobile team, I would like to opt-in for notifications to: a new mobile site, changes to the calendar for a mobile site
   6. I would like to enter my hours worked at a Site on a date.
   7. I would to be able to adjust my hours for a Site on a date unless approved by the Site’s SC.
   8. I would like to be able to post a Suggestion.
   9. I do not want to go through a registration process
   10. I do not want to be required to remember a unique password just for me
3. As a Site Coordinator (SC)…
   1. I would like to see a list of the Sites for which I am designated as a SC
   2. I would like to see a list of the Volunteer entered time log for edit and approval
   3. I would like to be able to a time log for a volunteer that failed to enter their work time
   4. I would like to be able to adjust site open dates
   5. I would like to be able to adjust open time and close time
   6. I would like to be able to only make changes to Site for which I am a designated SC
4. As an Admin…
   1. Email
      1. I would like to designate a list of Users that get an email when a new Suggestion is posted
      2. I would like to designate a list of Users that get an email when a site is created or removed
   2. Users
      1. I would like to see a list of all users currently in the system
      2. I would like to create a new user
      3. I would like to be able to remove a user
      4. I would the user details to include: name, email, phone, address, certification, roles, and a flag for membership on a mobile team
      5. Roles should include: none (no current role), Volunteer (eFiler), Site Coordinator, or Admin
      6. Certifications include: None, Basic, Advanced
   3. Sites
      1. I would like to see a list of all Sites
      2. I would like to be able to create a new Site
      3. I would like to be able to deactivate a site (not delete from the DB); flag bool; must specifically request to see deactivated sites
      4. I would like to be able to permanently delete a Site
      5. A Site would include: Name (friendly name), address, city, state, zip, a flag to indicate this is a mobile site, a list of Capabilities, a Calendar, and a list of zero or more SC’s responsible for a Site, latitude, longitude, Google PlaceID
      6. I would like to be able to modify the Site Capabilities
      7. Site Capabilities include: none, In Person Tax Prep, Drop Off, Express, and MFT (My Free Taxes)
      8. I would like the Site Calendar to show the dates the Site is open and the open/close times for open dates
      9. I would to be able to adjust the Site Calendar
      10. I would like to be able to designate the SC’s for a Site.
   4. Notifications
      1. I would like to be able to send a notification to all Volunteers
      2. I would like to be able to send a notification to all SC’s
      3. I would like to be able to send a notification to all Admins
   5. Suggestions
      1. I would like to see all submitted Suggestions
      2. I would like to be able to view a Suggestion
      3. I would like to be able delete a Suggestion
      4. I would like to be able to send the contents of a Suggestion in an email
5. As a Super Admin…
   1. I would like for these Super Admin features to only be visible to a few authorized users
   2. I would like to be able to set the season first day and last day
   3. I would like to be able to set the community password for Volunteers and SC’s
6. As any person using the App
   1. I would like to see the app graphics be based on one provided by COSA
   2. I would like to be able to use the App on an iPhone, an Android phone, or from a mobile friendly web site

* code to pull the lat/long/placeid from google via api
* put the default community passwords into the config; then auto-populate on new user creation
* allow admins to change their pw in the UI
* users can subscribe to events for a site (calendar changes)
* allow users to subscribe to new Suggestion emails
* allow users to subscribe to new site creation emails