# Coding the Law Final Project
*Volunteer Income Tax Assistance (VITA) Intake Questionnaire*

### Links
QnA Interview: https://jszafir.github.io/ctl/vita_intake_questionnaire.html
Source Code: https://jszafir.github.io/ctl/vita_intake_questionnaire.txt
Github Repo: https://github.com/jszafir/ctl
Refinement Process: https://jszafir.github.io/ctl/user_testing.pdf
Email from Partner: https://jszafir.github.io/ctl/feedback_email.pdf

### Framing
The IRS has a Volunteer Income Tax Assistance (VITA) program which mobilizes thousands of volunteers across hundreds of sites across the country. The training materials and tax preparation system is provided by the IRS and uniform across all sites. However, each individual site is left to create their own system for scheduling appointments with taxpayers for the preparation of their return by a volunteer. The intake process is based on IRS Form 13614-C, which has 40+ questions to be completed by the taxpayer in order to facilitate their return. Volunteers can receive either basic or advanced tax preparation certification and a main purpose of Form 13614-C is to determine whether the return will be basic or advanced so the client can be assigned an appropriate volunteer. At the site I volunteer at, as I assume is the case with many sites, a lot of time could be saved by frontloading some of this work in determining whether the return is basic or advanced. Currently, clients arrive to the clinic and start filling out the form manually, and then an intake volunteer will determine the status of the return and assign a volunteer that day. Sometimes there ends up being a wait time for clients because there aren't enough advanced preparers available at the time. If there were a way to figure out this information beforehand, the client could schedule a specific type of return based on their needs, resulting in overall better efficiency and reduce wait times for clients as well as idle time for volunteers.

### Research
Every site I could find that even had information posted simply provided the fillable PDF form of Form 13614-C. While this could be a way for people to get a jump on filling out the information, the form itself can be daunting for people and often it seems like they don't want to dive in themselves. There didn't seem to be any sites that offered a simplified version of the questionnaire simply to pair out the questions relevant to the type of preparation the return would require.

### Ideation & Prototyping
At first I thought about doing a clickable survey that would fill out the Form 13614-C based on the person's answers. However, I determined this would add unnecessary complexity. As discussed, the form can be daunting in its entirety. While putting it in survey form might help in that they can focus on one question at a time, it might ultimately lead to the same issues that clients have when they fill out the form in the office. There are still underlying questions that are better answered by the tax preparer rather than the client spending too much time trying to resolve it on their own prior to the meeting. Therefore, I thought it best to streamline the questions relating to the type of return.

### User Testing

I completed the user testing myself by going through each possible answer and making sure it resulted in the correct determination, as well as that each referenced link was accurate and functional. The process I followed resulted in five different versions until reaching the final product.

### Refinement

As discussed above, I created five versions in total before reaching my final result. Each time I went through, I considered ways to make things easier for the user. My notes upon testing each version can be found here (also listed above): https://jszafir.github.io/ctl/user_testing.pdf.

### Complexity/Robustness

This project is simple in its design but robust in that it considers all possible outcomes and situations and provides the user with all the information they need to efficiently determine their type of return and communicate that to the organization in preparation for their appointment. At completion of the survey, the user will have successfully completed the intended task and will not have to follow up in any way other than to receive their appointment time and show up. All required information and resources to get them prepared for their meeting are contained within the questionnaire.

### Impact & Efficiencies

As mentioned earlier, this will make the intake process much more efficient, and make better use of volunteers' limited time. Rather than having basic-qualified preparers sit idle while there are a line of people requiring advanced preparation, knowing ahead of time what each client will need can facilitate much better scheduling. Currently, we schedule clients simply based on time without consideration for what type of volunteer they will need to meet with. Having clients make this determination on their own before scheduling will minimize the amount of wasted time or overwhelm on the day of appointments.

### Fit/Completeness

The program sufficiently produces the information needed to solve this particular issue. It requires the user to know what forms they have, but these are forms they would be required to produce at their meeting anyway. Additionally, to alleviate confusion, I included links to each form that is referenced so that people have an example.

### Documentation

As everything is located in one place, it should be easy enough to make any updates and fixes. The QnA input is relatively self-explanatory, and I was able to re-learn in a short amount of time when revisiting the program for this project after not having interacted with it much since early on in the semester.

### Real World Viability

In theory, the questionnaire could go live tomorrow and be useful. There could be some improvements implemented once it takes its final form within the CAAS website, such as auto-populating an email at the end of the survey rather than providing the copy/paste message. Those

types of improvements would be minimal and would not make or break the overall function of the questionnaire and appointment process that this tool serves.

### *Sustainability*
The IRS website updates its forms each year by uploading the new forms to the existing URLs. This helps tremendously in the way that the links will not become useless year after year. Each year, it will be useful to look over the updated Form 13614-C to ensure there have been no substantive changes, and if so, to implement them into the questionnaire. However, due to the nature of tax law and the macro-level application of it for this purpose, changes would likely be rare and minimal.