

MyFreeTaxes 2023 Pre-Season Webinar

November 16, 2022 3 pm ET

Agenda

- Welcome
- Intro to MyFreeTaxes: Program & Key Features
- 2022 Results Summary
- 2023 Improvements: expanded support, filer guides, website updates
- MyFreeTaxes VITA Volunteers
- MyFreeTaxes Self-Employment Tax Guides
- Outreach Materials (available now)
- Q&A

Today's Speakers



Bryndan Stueve

Manager
Community Impact
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Ynaira Burgos

Manager, Economic
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Laura Scherler

Senior Director
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Intro to MyFreeTaxes: Program & Key Features

What is MyFreeTaxes?

MyFreeTaxes is an online tax filing program that helps people file their federal and state taxes for free while getting the assistance they need.

United Way provides MyFreeTaxes in partnership with the IRS's Volunteer Income Tax Assistance (VITA) program to help filers prepare their tax returns on their own or have their return prepared for them for free.

For millions of Americans, tax refunds and credits are essential to their financial stability and success. These credits maximize filers' refunds and provide important opportunities for individuals and families to build financial stability. For many households, their tax refund may be the biggest check they receive all year.

That is why United Way provides MyFreeTaxes. Since 2009, MyFreeTaxes has helped more than 1.3 million people file their taxes for free while claiming over \$1 billion in refunds and saving over \$260 million in filing fees.

How MyFreeTaxes Works



MyFreeTaxes is available at MyFreeTaxes.com

Users choose how they want to file:

- a. “File My Own Taxes” → DIY using our partner’s tax software
 - VITA: TaxSlayer FSA (72%)
 - Non-VITA: alternative free software option (such as Cash App Taxes) (12%)
- b. “Have My Return Prepared For Me” → return prepared for them by online and local VITA programs (16%)
 - GetYourRefund.org
 - VITA Site Locator
 - 211

MyFreeTaxes User Benefits

Convenient

- Free federal and state returns
- No geographic or age limits
- “No wrong door” program design ensures everyone accesses the free filing option they need and are eligible to receive

Accessible

- Mobile friendly
- Available in English and Spanish
- Includes Schedule C for Small Business Owners, Contractors, Childcare + Gig Economy
- Operates all year (IRS e-filing January – October)

Supportive

- MyFreeTaxes Helpline and email support systems are staffed by VITA-certified support specialists

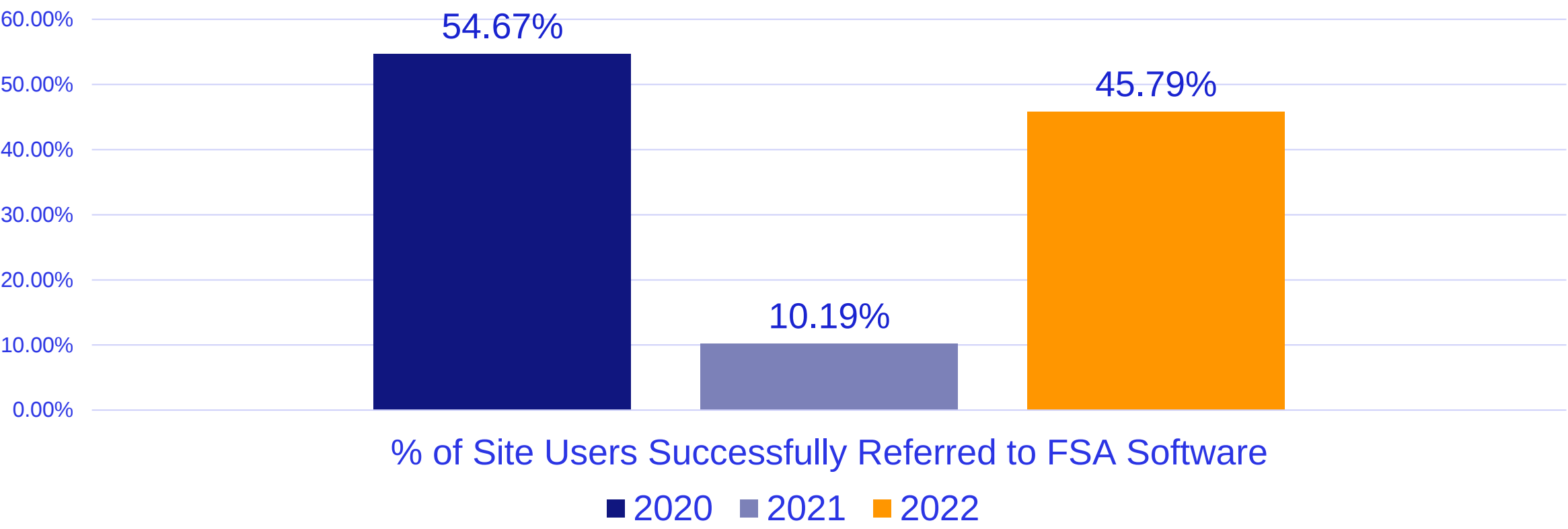
MyFreeTaxes Partner Benefits

- Increase VITA access all year
- Relieve local VITA capacity constraints
- Free up seats for limited in-person VITA services
- Extend free tax filing access to Sched. C filers, incl. Gig Economy and Small Business Owners (more on this later!)
- Increase your grant outcomes and quantify your impact with funders
- Increase financial well-being in your community
 - MyFreeTaxes filers save \$200+ in filing fees
 - Average refund of \$2,165

MyFreeTaxes 2022 Results

Streamlined Triage and Referral Process Introduced in 2022 Fixed a Major Challenge from 2021

Many More MyFreeTaxes VITA Filers Are Successfully Accessing the FSA VITA Software



Streamlined Triage and Referral Process Introduced in 2022 Fixed a Major Challenge from 2021

How would you like to file your taxes?



File My Own Taxes

- Our most popular option
- Self-file and get help when you need it
- Fastest (takes most filers an hour or less)



Have My Taxes Prepared For Me

- Have your return prepared for you online or in-person
- Typically takes 1-2+ weeks
- For filers who make about \$58,000 or less



Simplified Filing with GetCTC

- Streamlined self-filing to claim specific credits
- Claim the Child Tax Credit (CTC), Earned Income Tax Credit (EITC), and third stimulus payment
- Live chat support

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File My Own Taxes

Let us help you file your own taxes for free.

This is a great option for people who:

- Are filing a current year return (for 2021 taxes).
- Are comfortable using tax software, or want to learn.

Did you earn less than \$73,000 in 2021?*

Yes

No

What is your ZIP code?*

22314

Are you a resident of Puerto Rico?*

Yes

No

☐ I would like to opt-in to be contacted by United Way (optional).

FILE NOW

2

Thank you for using MyFreeTaxes.

We're transferring you to TaxSlayer using our special referral link so you can file your taxes for free.

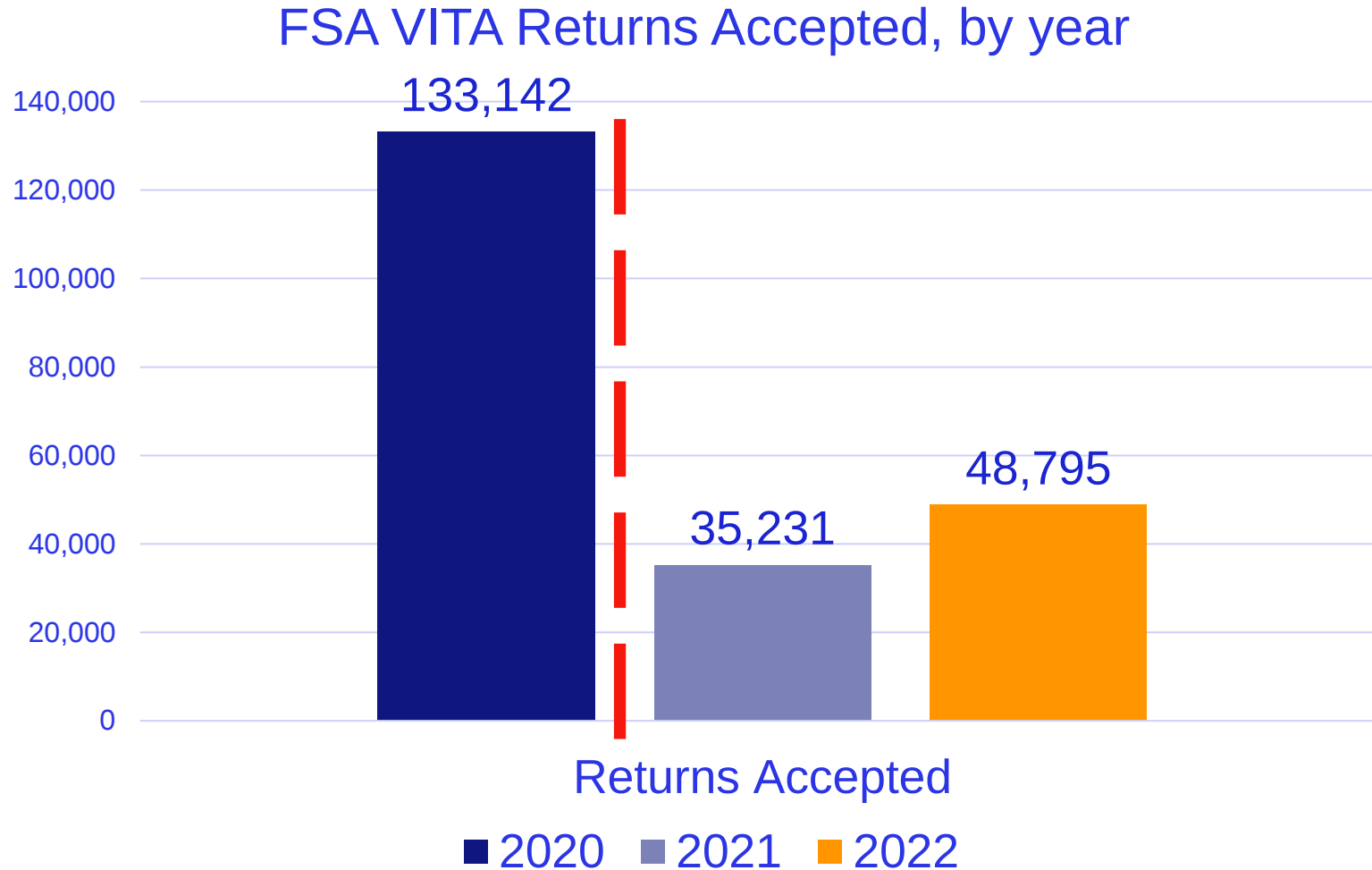
Please note, this software does not support filing for users who earn \$73,000 or more in 2021.

If you have questions while filing, please come back and visit our Support page.

8 seconds remaining
[FILE NOW](#)

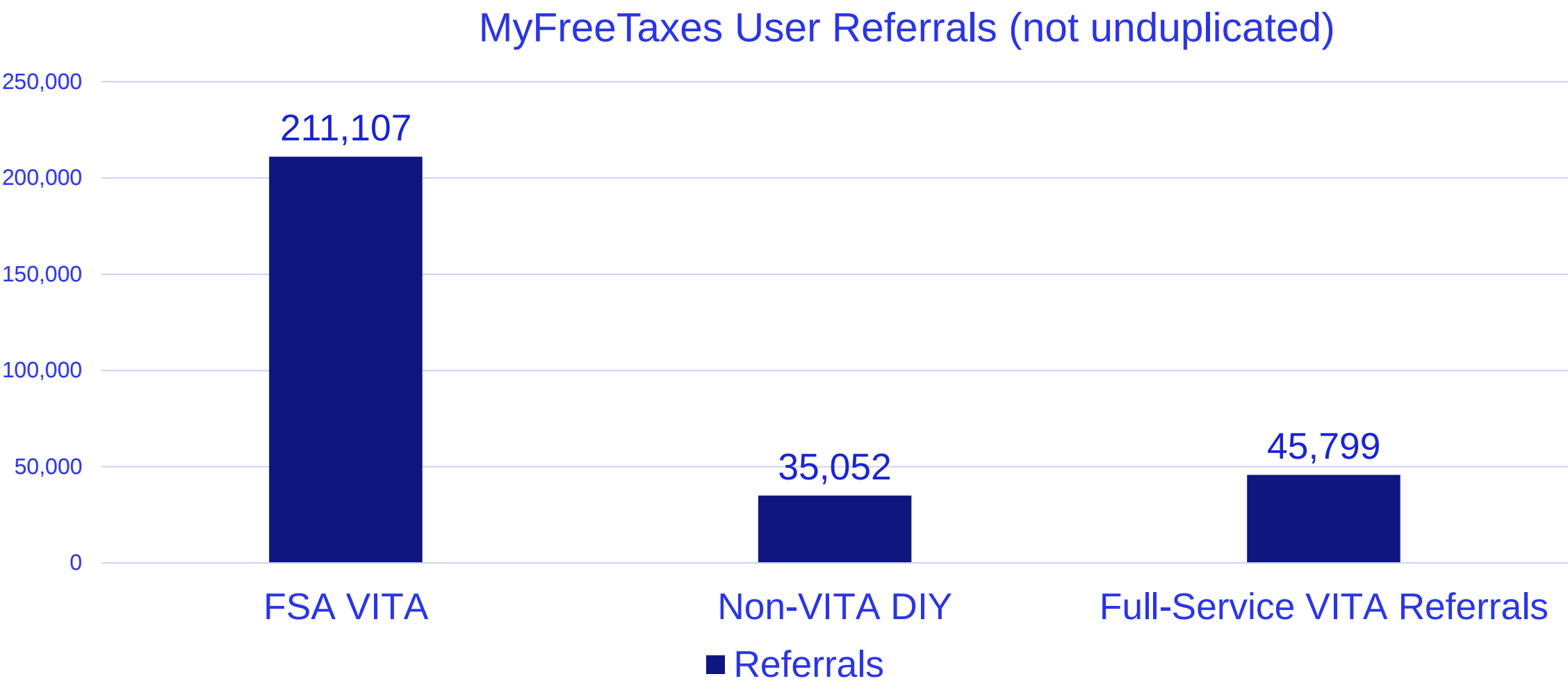
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FSA VITA Returns Production Also Started to Rebound in 2022



- Software change after 2020 season led to an initial drop in filers
- Change is hard for partners and filers. Taxes are hard and filers don't like change!
- Keys to recent growth incl.:
 - strong partner advocacy;
 - promotion by trusted gov't and nonprofit partners;
 - Service reliability and consistency
 - Iterative service improvements (more on this later)

Where We Sent Users in 2022



MyFreeTaxes 2023 Improvements

2023 Improvements: Expanded Support

- MyFreeTaxes Helpline: 35k calls in 2021, 4k calls in 2022
- Email support: 15k+ email inquiries 2022 (vs 3k in 2021)
- Launched searchable FAQs in 2022: 44k page views

2023 Strategy: provide multiple support styles and expand filer resources

- Keep phone Helpline
- Expand FAQs and written filer guides
- Recruit MyFreeTaxes VITA Volunteers to speed up and expand our support options.
 - MyFreeTaxes VITA Volunteers lead Email and Live Chat support → faster response rate
 - Stretch goal: video chat support (depends on capacity)

2023 Improvements: Filer Guides

We are producing multiple new filer guides to increase filer success. Guides currently under production include:

- FSA VITA Software Filing Guide: using MyFreeTaxes to access FSA software + using FSA software to complete your return
- MyFreeTaxes Guides to Filing Self-Employment Taxes: an in-depth guide to preparing and filing self-employment taxes using MyFreeTaxes and FSA VITA (more on this later)
- What other guides would you like us to produce?

All guides and materials will be available in English and Spanish. All will be in written format and some will include video format companions.

2023 Improvements: MyFreeTaxes Website Updates

- User Flow Updates: We have renamed our various filing options based on feedback from MyFreeTaxes filers. See our changes live now at www.myfreetaxes.com and www.myfreetaxes.com/es
- Building a case management system for Email support. Launch ETA: 2 weeks
- Developing Live Chat support available on MyFreeTaxes. Launch ETA: January.
- Management of MyFreeTaxes in Spanish is now done fully in-house, so any changes we need to make to our Spanish site will happen immediately.

MyFreeTaxes VITA Volunteers

MyFreeTaxes VITA Volunteers

Now Recruiting MyFreeTaxes VITA Volunteers for the 2023 Season!

- Please help promote this opportunity!
 - Remote/virtual volunteering
 - Volunteer 2+ hours a week and set your own schedule
 - Deliver huge financial impacts
 - Activities include: email and live chat support; writing guides and materials; conducting research; and more!
 - Timeline: training starts in December. Additional training may be available in January and February
 - Accepting English and Spanish speaking volunteers

MyFreeTaxes VITA Volunteers

Learn more and download our flier at:

MyFreeTaxes.com/Volunteer



MyFreeTaxes is looking for volunteers!

Who We Are

MyFreeTaxes helps tens of thousands of low- and moderate-income people a year file their taxes and receive hundreds of millions of dollars in tax credits and refunds -- for free!

United Way provides MyFreeTaxes in partnership with the IRS's Volunteer Income Tax Assistance (VITA) program to help filers prepare their federal and state tax returns on their own or have their return prepared for them for free.

Primary Volunteer Activities

- Assist MyFreeTaxes users to successfully file their taxes for free using our partner software options
- Answer MyFreeTaxes user questions via email and live chat
- Identify common questions and support the expansion of our FAQ

Secondary Volunteer Activities

- Conduct data analysis and research projects to improve our program's impact
- Produce tip sheets and filer guides to help MyFreeTaxes users file their taxes accurately and confidently
- Conduct UI/UX testing to improve our user experience
- Identify, co-design, and propose your own projects



MYFREETAXES.COM/VOLUNTEER

Email Us For More Information

Info@myfreetaxes.com with the subject line of "MyFreeTaxes Volunteer"



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MyFreeTaxes.com/Voluntario



MyFreeTaxes busca voluntarios!

Quiénes Somos

MyFreeTaxes ayuda cada año a decenas de miles de personas con ingresos bajos y moderados a presentar sus impuestos (planillas) y recibir cientos de millones de dólares en créditos fiscales y reembolsos, ¡gratis!

United Way ofrece MyFreeTaxes en asociación con el programa de Asistencia Voluntaria al Contribuyente (VITA) del IRS para ayudar a los declarantes a preparar sus declaraciones de impuestos (planilla) federales y estatales por sí mismos o a que se las preparen en un sitio presencial.

Principales Actividades de Voluntariado

- Asistir a los usuarios de MyFreeTaxes para que presenten sus impuestos (planillas) sin cargo utilizando nuestras opciones de programas
- Responder a las preguntas de los usuarios de MyFreeTaxes por correo electrónico
- Identificar las preguntas más comunes y apoyar la ampliación de nuestras preguntas frecuentes

Actividades de Voluntariado Opcionales

- Producir hojas de consejos y guías de presentación para ayudar a los usuarios de MyFreeTaxes
- Realizar pruebas en MyFreeTaxes para mejorar nuestra experiencia de usuario
- Identificar y codificar sus propios proyectos
- Conducir proyectos de análisis de datos y de estudio



MYFREETAXES.COM/VOLUNTARIO

Envíenos un E-mail para Más Información

Info@myfreetaxes.com con la línea de asunto "Pregunta de MyFreeTaxes Voluntarios"



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MyFreeTaxes Guides to Filing Self-Employment Taxes

MyFreeTaxes Guides to Filing Self-Employment Taxes

LMI small business owners have typically been excluded from accessing VITA free tax filing services due largely to scope restrictions for VITA volunteer preparers.

However, the FSA VITA software does support the filing of returns with self-employment income. VITA-eligible small business owners may self-prepare their return via MyFreeTaxes.

Assistance will be available for in-scope items from the MyFreeTaxes Helpline and the MyFreeTaxes VITA Volunteer team. Assistance for items that are out of scope for VITA assistance will be provided via our *MyFreeTaxes Guides to Filing Self-Employment Taxes*.

- Three guides: one for general Schedule C filers; one for home based child care providers; and one for gig economy workers (uber, lyft, doordash, etc.)
- Will be available in PDF format, as webpages on MyFreeTaxes, and via video format
- All content in English and Spanish
- Release timeline: first two weeks of January. (Webinar announcement forthcoming.)

MyFreeTaxes Outreach Materials

MyFreeTaxes Outreach Materials

MyFreeTaxes outreach and promotional materials are up on the MyFreeTaxes Partner Portal now – www.unitedway.org/myfreetaxes/partners/materials/partner-promotion

A few of our favorites:

- **MyFreeTaxes One Pager** in [English](#) and [Spanish](#)
- **MyFreeTaxes Posters and Info Cards**
 - White Poster in [English](#) and [Spanish](#) // Blue Poster in [English](#) and [Spanish](#)
 - White Info Card in [English](#) and [Spanish](#) // Blue Info Card in [English](#) and [Spanish](#)
- **MyFreeTaxes Videos**
 - This 60-second explainer video in [English](#) and [Spanish](#) provides an intro to MyFreeTaxes and summarizes our services.
 - This 15-second [English promotional video](#) promotes the basic benefits of MyFreeTaxes.

Q&A

Email any remaining questions to Partners@MyFreeTaxes.com

Resources

MyFreeTaxes: preview our revised referral process at www.MyFreeTaxes.com

MyFreeTaxes Partner Portal: access our partner materials, including outreach content at www.unitedway.org/myfreetaxes/partners

Outreach materials: www.unitedway.org/myfreetaxes/partners/materials/partner-promotion

Partner data: www.unitedway.org/myfreetaxes/partners/data

Partner webinar: www.unitedway.org/myfreetaxes/partners/quick-tools/webinars

Questions or comments about MyFreeTaxes? Contact us! partners@myfreetaxes.org

LIVE UNITED

Thank you