



REI Tour/DeafTax.com VITA Pilot

BUILDING EQUAL ACCESS FOR DEAF TAXPAYERS

Phase 1 Report
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“Taxpayers with disabilities often find themselves attempting to navigate and comply with a complex tax system that was not designed to provide equal access. Taxpayers who are blind, deaf, or have other disabilities encounter numerous barriers unique to these groups”

(The 2006 National Taxpayer Advocate's Annual Report to Congress)

(http://www.irs.gov/pub/irs-utl/2006_arc_vol_1_cover__section_1.pdf p 376).

EXECUTIVE SUMMARY

The National Disability Institute (NDI) through its signature project the Real Economic Impact Tour (REI Tour) in partnership with the IRS Stakeholder Partnerships, Education and Communication (SPEC), DeafTax.com, and Schwarz Financial Services designed and implemented inaugural research in collaboration with five REI Tour cities to increase equal access to free tax assistance for Deaf taxpayers. This pilot utilized real-time American Sign Language (ASL) interpretation and Volunteer Income Tax Assistance (VITA) certified off-site Deaf tax preparers to bring free tax preparation to Deaf taxpayers who are Earned Income Tax Credit (EITC) eligible.

Deaf VITA certified tax preparers located in Bethesda, MD and Rochester, NY prepared taxes for Deaf taxpayers in Rochester, NY, Denver, CO, New York, NY, Charlotte, NC, and Jacksonville, FL. Deaf taxpayers were invited to participate in the pilot by community-based organizations that either ran a VITA program or provided services for the Deaf community. An internet calendar allowed cities to book reservations and coordinate schedules for the remote Deaf tax preparers. Site representatives or volunteers were asked to provide an intake survey to each taxpayer.

Remote tax preparation was conducted by the use of state-of-the-art Video Relay Services (VRS) technology that connected the Deaf taxpayer and Deaf tax preparer through a video phone allowing Deaf to Deaf tax preparation. Deaf tax filers made an appointment at the designated hosting organization that was equipped with a video phone, a scanner and a computer that transmitted the filer's financial documents to the tax preparers in the two remote locations. The VITA certified tax preparers, Rochester Institute of Technology students, Schwarz Financial employees and IRS/DEAF (Deaf Empowerment and Advocacy Forum) Affinity Group members, were the designated preparers and responsible for submission of the filers' return.

A total of 80 federal returns were prepared including 13 for families. These 80 returns generated \$111,343 in federal refunds and \$35,092 in state refunds. Included in these refunds is \$39,086 in EITC. The taxpayers assisted through this Pilot saved \$11,353 in tax preparation fees, money they would have had to spend if they had gone to a professional tax preparer.

Following are brief descriptions of the Findings and Recommendations. For full report go to Findings and Recommendations on page 21.

FINDING #1

Build trusted networks between community-based non-disability organizations providing free tax assistance and other asset building services and the Deaf community.

Volunteer Income Tax Assistance volunteers and coordinators all requested further education in addressing the needs and preferences of Deaf taxpayers. Deaf etiquette was new to many working on this pilot and communication was often challenged because of the use of new technologies not familiar to coordinators and researchers. Some Deaf taxpayers thought the idea of free tax assistance was a “hoax” and even called their Deaf colleagues “to check it out” before signing-up. The pilot sites with interpreters and established relationships with their Deaf community produced the most returns and reported the most success.

Recommendation that Phase 2, 2010 pilot require any participating city to have a Deaf Champion participating so there is an established “ambassador” between the Deaf and non-Deaf partners. On a systems level, NDI and national Deaf organizations work collaboratively to ensure the reliability and trustworthiness of the initiative (See Finding #6 to develop a strategic marketing and outreach Deaf Taxpayer campaign.).

FINDING #2

Prioritize roles and responsibilities for the Deaf and non-Deaf systems involved to operationalize the pilot.

Coordinators involved reported the need to better clarify and coordinate the roles of volunteers; the allocation of time for staff; the installation of IT and VRS phones ready for tax season; the development of a volunteer training module on working with the Deaf culture; and the need for a better scheduling instrument than the online calendar used in 2009.

Recommendations that Deaf pilot cities convene in early Fall of 2009 to develop strategies and procedures for 2010 tax filing season. NDI develop a Deaf taxpayer module for volunteer training to be distributed to pilot cities and that VRS technology be delivered and installed by early December 2009.

FINDING #3

Multiple free tax assistance methods are being used for serving the Deaf taxpayers.

Pilot cities identified a variety of accommodation preferences from participating Deaf taxpayers that included 1) use of the VRS phone with Deaf taxpayer receiving free tax assistance from a Deaf tax preparer remotely; 2) Co-located VITA sites that provide both Deaf taxpayers and non-Deaf taxpayers free tax assistance; 3) use of written English communication, lip reading, TTY or ASL interpreters were also reported as preferences. It was also reported that the quality of the returns prepared Deaf on Deaf using the VRS was excellent and that could be because of the use of the first language for Deaf taxpayers that is ASL and not English.

Recommendations that research be conducted to better understand the tax filing preferences of Deaf taxpayers and that volunteer tax sites provide various methods and education to volunteers.

FINDING #4

Develop New IRS VITA Regulations to Serve Deaf Taxpayers: In order to be in compliance with VITA regulations concerning the operation of quality sites, IRM 22.30.1.4.8.3.2 needs to be revised to include the various methods of non-traditional tax preparation proposed where the taxpayer and the tax preparer are not physically located at the same site. This would include the use of a video phone where they are speaking in ASL to each other as well as the use of a relay interpreter.

Recommendation that further research be conducted to study the various technologies available to serve more taxpayers for the VITA initiative and propose a redesign of existing VITA regulations written prior to the development of this technology. The IRS W&I Research Benchmark Study (2007 p. 31) recommended that home tax assistance might be considered for the 25% of taxpayers with disabilities they found had “difficulty leaving their home.” Although this recommendation was not referring to the Deaf taxpayer it has implications for using computers with video cameras and other technology that would link the taxpayer to the services in the community remotely. This practice was reported in other cities not part of this pilot.

FINDING #5

Develop clear protocol and education for the systems providing accessible communications to Deaf taxpayers. Individual taxpayers who are Deaf reported challenges in accessing information about their tax needs when using public systems. Whether a free 2-1-1 call-in service or IRS Walk-In Center it was unclear what accommodations were being made on behalf of Deaf taxpayers and what training and/or instruction employees providing these public services were given to assist Deaf taxpayers.

Recommendation that NDI and IRS adopt a tested and approved menu of communication styles for the Deaf taxpayer that reflect the new digital technology advancements as well as the more traditional assistive technology devices. IRS W&I Research should conduct a national survey for Deaf taxpayers to establish the characteristics and profiles of Deaf taxpayers and develop training for all employees providing free tax assistance services to Deaf taxpayers in public settings. Community based organizations providing public information such as 2-1-1 numbers should provide VRS hotlines as well to ensure that all citizens have access to public information.

FINDING #6

Develop strategic marketing and outreach materials for Deaf taxpayers and their families about free tax services, available credits and provisions, and volunteer education.

Taxpayers who are Deaf that participated in this pilot, including IRS DEAF Employee Resource Group members said it was an “awesome experience” and that they wanted to learn more about available tax credits and provisions and other asset building opportunities. However, most Deaf individuals interested in volunteering could not receive the certified training due to lack of resources to hire ASL interpreters or have the trainings produced on video.

Recommendations include multi-faceted outreach strategies that include partnering with IRS Alternative Media Center; development of online Deaf certified tax preparation course using technology that would best communicate information; connect community-based coalitions to the best media and communication methods for reaching Deaf taxpayers and their families; and develop a public resource library for serving Deaf taxpayers.

IMPORTANCE OF THE PROBLEM

There is no other single policy issue that captures the potential of existing civil and human rights as does the emerging field of asset-development policy, with its potential to enable and facilitate full social, civic, and economic participation for persons with disabilities. The asset-development policy approach transcends traditional “income maintenance” and other charitable, medical, and social programs that have framed low-income and disability policy since the turn of the twentieth century (Mendelsohn, 2006). It recognizes that owning assets is a core value of citizenship, which promotes community inclusion and social participation, stabilizes lives, and increases health and function for all Americans (Boddie, Sherraden, Hoyt, Thirupathy, Shanks, Rice, et al., 2004; Davies, 2008; Harrison, 2008; Hartnett & Morris, 2008; Mendelsohn, 2008). Systematic research on asset accumulation, much of which was conducted by the Asset Accumulation and Tax Policy Project (AATPP), a National Institute on Disability and Rehabilitation Research (NIDRR) funded grant from 2003 - 2008, revealed that people with disabilities continue to be excluded from core opportunities of home ownership, free tax filing assistance, savings and investments and pension participation (Hartnett, Partch-Davies, Mendelsohn, Morris, Ratigan, Rivera, Harrison, Fong, Foley, Apfe, & Stengel 2008). The majority of low-income families with disabilities are the least

likely to possess three key resources that are associated with positive asset ownership—owning a home, owning a car and pension participation (Carasso & McKernan, 2007; U. S. Census Bureau, 2005a; Schmeling, Schartz, Morris, & Blanck 2006; Sherraden, 1991).

The target population for the REI Tour/DeafTax.com VITA Pilot was people who are Deaf and at risk of poverty nationwide differentiated by age, gender, income level, severity of disability, employment and education status, minority background, and location. Despite differentiating individual characteristics the common denominator is poverty which adversely impacts expectations and behavior, limiting advancement of self-sufficiency and community participation. The second target population was system actors at multiple levels involved in disability and in tax preparation for the Deaf.

The literature on asset development/economic empowerment for low-income persons has expanded the traditional definition of asset development/economic empowerment, which includes ownership of money, savings, stocks, and real and personal property, to consider human capital assets such as skills, knowledge and experiences gained from education and training (Beeferman, 2001). Researchers have noted that any definition of asset development/economic empowerment for low-income persons must include the “hidden costs” inherent in

living and working with a disability that affect whether individuals with a disability go to work or school, participate in everyday community life or interact with tax and financial service organizations (Mendelsohn, 2006; Mendelsohn, Hartnett & Morris, 2005). Mendelsohn describes “gateway assets” as the value of access to family and social contacts, education, transportation, communications, health care, and expert advice (such as tax and financial) for individuals with disabilities.

Prior research has identified persons with disabilities as a major underserved market segment to receive assistance from national low-income tax and asset building coalitions and the private sector financial services industry (Hartnett, 2006; IRS, 2007c). One out of five Americans report having a disability and over 20 million families have a member with a disability. The National Disability Institute in partnership with the Internal Revenue Service (IRS) Stakeholder Partnerships, Education and Communication (SPEC), the Taxpayer Advocate Service (TAS) and over 340 community-based asset building coalitions have responded to the gap in this underserved market segment by building a national model for assisting people with disabilities out of poverty through collaboration with existing free tax coalitions (Hartnett, 2006; IRS, 2007c). The REI Tour began in 2004 to help low-income taxpayers with disabilities and their families receive free tax assistance and gain access and utilization to favorable credits and provisions. The REI Tour provides education, a yearly audio conference series, monthly peer-to-peer grantee calls and a yearly national conference/Mayor’s Academy

where dozens of REI Tour cities are provided stipends to attend and share resources and best practices. In five years the REI Tour provided over 333,000 individuals with disabilities with free tax filing assistance with refunds over \$312 million representing an estimated savings of \$66 million in preparer fees.

IRS SPEC and TAS produced the first ever reports to Congress championing the unmet information and technology needs of taxpayers with disabilities to access and use tax services and information (IRS, 2007a; IRS, 2006; 2007b). In addition, IRS Wage & Investment Research in collaboration with NDI produced qualitative and quantitative data on individual preferences, characteristics, and behaviors of taxpayers with disabilities known as the Benchmark Study (Hartnett, 2006; IRS, 2007c). This research highlighted the needs of taxpayers with physical disabilities. Due to design issues with the survey instrument, a significant number of taxpayers who were blind or Deaf were not captured, although the research found that 24 percent of taxpayers report a disability of blindness or deafness (Hartnett, 2006; IRS, 2007c). The Benchmark Study found that over one million taxpayers with disabilities are not filing tax returns. NDI estimated that this population of non-filers could be missing out on tax credits worth over one billion dollars. Additionally, people with disabilities were found to underutilize the internet and many asset building strategies (pensions, savings, etc.) and that over 25 percent were unable to leave their home due to their disability.

In the broader research on asset development for persons with disabilities three economic empowerment interventions for people without disabilities that have garnered the most attention by policy makers and practitioners are the Earned Income Tax Credit (EITC), Individual Development Accounts (IDAs), and Financial Education (Brown, Kuttner, & Shapiro, 2005). There are significant barriers for Deaf taxpayers for each of these interventions. For example public policy penalizes receipt of assets over and above a set limit for many people receiving public benefits and working and could mean loss of eligibility for health care. Currently, public policy that does not clearly delineate whose role it is to ensure that the necessary resources for interpreters or video relay services be available so Deaf taxpayers have full access to public information and services provided by federal agencies, non-profits and/or volunteer programs. IDAs have a limited scope of asset goals for matched savings plans that do not address the needs of youth transiting from school to work who will not be able to buy a home, go to college or start their own business (three purposes of the Assets for Independence Act). Financial Education curricula although ubiquitous has not been tailored for the Deaf customer who does not speak English but ASL. Funding levels for all these strategies are limited so capacity is also limited in the number of “accounts” or education programs that are designed specifically for taxpayers who are Deaf. The interventions continue to be studied in isolation rather than in a broader framework that layers and integrates multiple asset building strategies to respond to the complex and unique challenges of being poor and Deaf. Researchers

determined that relevant differences of individual characteristics may impede or facilitate valued outcomes including behavioral differences that establish readiness to participate in asset building activities (Davies; Harrison; Hartnett & Morris; Foley & Martinez; Mendelsohn).

Only the EITC/tax intervention has received Congressional attention to understand barriers to access for taxpayers with disabilities accessing IRS services and information. The National Taxpayer Advocate 2006 Annual Report to Congress found that taxpayers who are blind, Deaf or have other disabilities “encounter unique barriers to navigating and complying with a tax system that was not designed to provide equal access” (p.376). The 2006 Report identified three barriers for taxpayers with disabilities, particularly for taxpayers who are blind or Deaf, when attempting to comply with and navigate the IRS tax system (pp.376-377):

- 1) **Communication Barriers** - the need for translator, interpreters, materials in an alternative format, or materials that can be accessed with assistive technology. The type of accommodation a taxpayer needs to communicate effectively will vary according to the taxpayer’s disability.
- 2) **Education and Outreach to the Disability Community** – IRS needs to increase its efforts to educate taxpayers with disabilities about the helpful services available to them, when and whether to file a tax return, and other issues such as tax deductions or credits. In addition, the Report mentioned that the Small Business/Self-Employed (SB/SE) Operating Division should reach out to taxpayers with disabilities who are attempt-

ing to set up a small business. SB/SE was also asked to improve its outreach to owners of small businesses about tax incentives available for complying with the Americans with Disabilities Act (42 U.S.C. §§ 12101 et seq (1990); PL 101-336 (Jul.26, 1990). See also Most Serious Problem, Small Business Outreach, supra.). This recommendation is relevant to disability because of the growing focus on self employment. In 2008 several REI Tour cities reported the inability of the VITA site volunteers to assist self-employed taxpayers who are blind or Deaf. VITA prepares individual income tax returns for taxpayers using Form 1040 but with only certain Schedules. VITA prepares only Schedule C-EZ and does not provide assistance with a Schedule C form that would assist many self-employed taxpayers. Self employment is a growing career option for individuals with disabilities and for the Deaf taxpayer it was not until the late 1990s that the Deaf and Hard of Hearing Entrepreneurs Council (DHHEC) was established to assist members interested in establishing their business with necessary information and tax assistance (Pressman, 1999).

3) Problems with Deductions and Credits – taxpayers with disabilities may be eligible for a variety of tax deductions and credits, but these provisions of the tax code are often complex and confusing to the most sophisticated tax professionals, let alone a lay person who may face obstacles in obtaining IRS resources. The report noted that due to the complexity of the tax system, small business owners may have difficulty understanding when they can take deductions and credits for expenses incurred as a result of complying with the Americans with Disabilities Act (42 U.S.C. §§ 12101 et seq (1990); PL 101-336 (Jul.26,. 1990).

If taxpayers receive good customer service including appropriate accommodations, they are more likely to comply with their tax obligation. This would have the impact of increased voluntary compliance and would help close the tax gap.

TARGET POPULATION AND SITE SELECTION

Individual Taxpayers: The REI Tour cities have been very successful in assisting the non-disability VITA community-based coalitions about making sites generally accessible for the taxpayer with a mobility disability. Most cities now contact their regional Disability Business Technical Assistance Center (DBTAC) or their Mayor's Office on Disability for education and material in making their sites accessible. Best practices have included labeling all flyers with the international symbol for disability so people needing wheelchair access know which sites are accessible to the use of mobile tax clinics where the tax preparer brings a laptop and visits a disability organization and provides free tax assistance. REI Tour cities visit www.reitour.org for free downloads of fliers and information and education modules other REI Tour partners are using to reach their taxpayer with a disability.

However, in 2008 REI Tour city leaders asked for assistance in how to best serve taxpayers who were Deaf. A number of cities in 2008 were providing taxpayers who were Deaf with tax assistance but felt that they needed tools and resources to better accommodate the tax filing needs of the Deaf taxpayer. It is estimated that about 4.3 percent of the disability population experience blindness or deafness (Cornell University, Disability Statistics 2007, p.7 www.disabilitystatistics.org). The IRS Benchmark Study in 2007 (Publication 4640

(10-2007) Catalog Number 50912H) reported that 17 percent of respondents were individuals with hearing disabilities with the highest percentage of respondents between ages of 46 and 55 (IRS Benchmark Study, p12). We know that the average age for taxpayers participating in free tax preparation and the Earned Income Tax Credit (EITC) is 32 and that the average age of EITC recipients with disabilities was 42 (Hartnett, J. (2006) Ford Study, National Disability Institute, Washington, DC www.reitour.org). The REI Tour did not have additional funds to provide this special outreach for the Deaf so cities agreed to use their REI Tour mini-grants of \$3000 - \$4000 to participate. Because of limited resources NDI chose to focus on the Deaf taxpayer in 2008 although the Blind were asking for assistance as well.

Systems: The main focus of the REI Tour is building infrastructure within existing free tax coalitions to better serve taxpayers with disabilities. In its five years, the REI Tour has found that Community-based VITA coalitions are interested in examining what services, technology and procedures will best help them provide free tax assistance to taxpayers with disabilities and more specifically for this report for Deaf taxpayers. This Project provided five coalitions with a program model and regulations for serving Deaf taxpayers. In addition, the systems

providing the free tax preparation asked whose responsibility it is to provide accommodations for Deaf taxpayers when it is a volunteer program. This issue is addressed further in this report.

The purpose of the REI Tour/DeafTax.com VITA Pilot was to develop methods, procedures, and use of existing and new technology that would maximize the full inclusion and integration of Deaf taxpayers into society, employment, independent living, family support and economic and social self-sufficiency through full access to and utilization of exist-

ing tax services and credits. In addition, the Pilot intended to empower systems that currently provide free tax filing assistance with customized, comprehensive, coordinated and fully accessible state-of-the-art technology and education tools to serve Deaf taxpayers.

The Pilot emphasized: 1) sensitivity to the diversity of Deaf individuals; 2) consideration of the range of barriers to be reduced to maximize utilization of access to free and paid tax assistance services that increase savings and asset accumulation; and 3) examination of the Pilot's impact on enhanced community participation.

REI TOUR DEFTAX.COM PILOT GOALS

The pilot's main goal was to advance the relationship of access to and utilization of tax resources with economic self sufficiency for Deaf taxpayers measured by providing new, evident-based knowledge on: (a) individual level characteristics that affect full access and use of available tax resources; (b) increased use of favorable tax credits, provisions and services; (c) successful replication of positive features of the Project with 79 REI Tour cities not participating in the project; and (d) development and pilot testing of new accessible training procedures, VITA regulations and technology use for VITA volunteers, the disability and behavior health care workforce and individuals who are Deaf that promote increased asset building opportunities because of increased utilization of tax credits and services.

Early in 2008 REI Tour was contacted by Lucy Gorham, Senior Program Director of EITC of the Carolinas, seeking information about how to better serve the Deaf community. Through networking, Joshua Beal, Founder of DeafTax.com was contacted and offered to pursue a Pilot donating his professional expertise as a principal as well as a preparation

site coordinator with interns from Rochester Institute of Technology. He recruited one of his colleagues from Schwarz-Financial to coordinate a preparation site in Bethesda, MD. Joshua determined from traffic to his DeafTax.com Internet site that there was high interest in tax preparation in Rochester, NY and the Denver area. In addition the Workforce Center in Jacksonville, FL indicated an interest in being involved in the Pilot. NDI and DeafTax looked at U.S. Census Data as well but due to the limited resources (\$18,000 total for distribution among participating REI Tour cities and a \$30,000 in-kind donation from Schwarz-Financial, pilot city selection (in addition to DeafTax census data and the U.S. Census data reports) was based on a Tour city's prior work with the Deaf community and interest in working on this initiative. The Pilot was launched with two tax preparation sites staffed by VITA certified ASL proficient tax preparers in Rochester, NY and Bethesda, MD and six intake sites in five cities, Rochester, NY, Charlotte, NC, Jacksonville, FL, Denver, CO and two in New York City, one in Harlem and the other in Queens.

DEAF TECHNOLOGY AND COMMUNICATION NEEDS

NDI researched with its Deaf partners the best communication device to use for the pilot and immediately found that the digital video relay services (VRS) are fast replacing the antiquated analog means of communication for the Deaf community. NDI researchers were introduced to a national non-profit organization, the Deaf and Hard of Hearing in Government, Inc. (DHHIG) whose purpose is two-fold 1) to serve as an employee support group for Federal employees who are either Deaf or Hard of Hearing and 2) to serve as a resource organization for the nationwide Federal government regardless of the degree of hearing loss, the amount of assimilation into Deaf culture, and/or the mode of communication. An August 2008 Report found that video phones are fast replacing the telecommunication devices for the Deaf (TDD or TTY) because of their relatively low cost and widespread availability. The videophones have given Deaf people new possibilities to communicate over the telephone that is functionally equivalent to the ease of telephone use by hearing peers. DHHIG conducted a survey of 1,249 members and 26.6 percent responded. Sixty-six percent of the government employees who responded reported having no videophones. Nearly 40 percent of those who responded said they are denied one due to secu-

rity and/or workplace network issues (i.e. firewall). Approximately 31 percent were unable to acquire videophones due to other mitigating issues. Ten percent wanted a phone but were denied one due to funding concerns. DHHIG expects to use the survey results to assist the government in modifying its telecommunication policies, regulations, and standards to ensure that the videophone, which is functionally equivalent to a telephone, is widely available to the Deaf and Hard of Hearing government employees.

NDI then developed a partnership with Snap Telecommunications, a Video Relay Service (VRS), whose general counsel Jeff Rosen is a third generation Deaf person with years of public policy work on behalf of disability. Snap Telecommunications VRS provided the REI Tour/DeafTax.com VITA Pilot, partners with the Snap!VRS Telecommunications (Ojo) videophone. This allowed Deaf on Deaf tax preparation in real time. Snap was the first VRS provider to implement a SIP-based (Session Internet Protocol) video phone solution. SIP is a newer protocol for transmission of audio, video and text. Most importantly, SIP provides a greater measure of network security than does the older utilized standard, H.323. As such, the Ojo works well within

corporate and institutional security infrastructures. Ojo phones are working inside of the U.S. Senate, the House of Representatives, and many Fortune 500 companies. This innovative technology has led to great advancement in the communication options for the Deaf Community, including portable/mobile video phones, video mail, built-in “Voice-Carry-Over”, and secure transmission of personal and confidential information (a Deaf person can now “key in” their SS# or CC# through the video phone as opposed to having to finger spell it to the interpreter.

All that is needed to operate the Ojo video phone is a broadband connection (cable, DSL, FIOS). The Ojo video phone requires only 250kps, as opposed to 512kps for many other video phones to deliver 30 frames per second (TV quality) audio and video. This is an important differentiator, as within people’s homes and offices the broadband level fluctuates. For Snap competitors’ phones, if the broadband level, even temporarily, drops below 512kps (which is frequent), the customer and interpreter both see a degraded or fragmented video image as Internet packets are lost in the transmission. The likelihood of this happening with the Ojo is significantly less, as it only requires 250kps.

Many of competitors’ phones, Sorenson’s VP 100s and VP 200s, D-Links, and even software-based video phones (called Soft-phones) require either a television set or a computer/monitor to operate. Ojo is a stand-alone device that is, in most cases, plug-and-play

ready. You take it out of the box, plug in the power cord and the Ethernet cable and you are ready to go. The Ojo takes up only 36 square inches of desktop space, and is portable.

The “Voice-Carry-Over” feature mentioned above is important. Many Deaf and Hard of Hearing folks like to voice for themselves as opposed to having the interpreter voice for them. Because the Ojo has a built in speaker phone and due to the advanced call center functionality, the Deaf person can speak for themselves. Their voice will pass through the interpreter directly to the hearing third party, all without an additional phone call required. For many Deaf folks, this is an amazing advancement and often can eliminate the need for them to have a regular phone line.

The following quote, from a worker in California, explains what it means to have a video-phone as part of her workstation. “The growing shortage of interpreters in Silicon Valley has made it hard for Deaf employees to perform their job functions. The technical services representatives at Snap!VRS worked hand-in-hand with Agilent Technologies’ networking team to get my Ojo securely installed on our network. Now I have access to interpreters when I need them. Having the Ojo on my desktop has significantly increased my productivity. As importantly, having already gone through the process of solving my Company’s network security concerns, we have eliminated any barrier to employment for new prospective Deaf employees.” (Quote received from Richard Schatzberg, CEO Snap!VRS, January 13, 2009.)

DEVELOPMENT OF PROCEDURES

It was evident from the inception of the pilot that normal VITA site procedures would not satisfy the requirements of this Pilot for a number of reasons.

- Volunteers at the Intake sites would not always be certified VITA tax preparers yet Intake/Interview sheets would be necessary.
- Sensitive taxpayer information would be transmitted over non-secure lines thus necessitating clear taxpayer understanding and consent.
- Remote intake sites would need a method for determining volunteer availability.
- A close working relationship would be required with the six different IRS territories involved.

It was imperative that all participants in the Pilot understand and operate under the same set of procedures. On November 7, 2008, IRS released SPEC Policy Directive: IRM Section 22.30.1.4.8.3.2, Non Face-to-Face Rural VITA/TCE Site Operating Procedures. A procedure manual¹ for the Pilot was created using the Rural procedures as a basis and has not received any IRS approval as it is still in a pilot mode.

¹ See attached Document A - Procedure Manual

PILOT IMPLEMENTATION

The procurement and installation of the video phones was met with some shipping and technical issues, but the supplier was most helpful in conquering the problems. This is explained in more detail in Finding #2 below.

The actual pilot implementation, once the tax season began, was a learn-as-you-go process with everyone concerned making adjustments during the first few weeks. Several conference calls were held to make sure that everyone understood their roles and to clarify any remaining questions. In spite of this there were still stumbling blocks, the greatest one being the non-Deaf community not understanding that there is a definite Deaf culture and secondly that ASL is a language of its own and not the same as spoken English.

Site coordinators and Deaf partners reported the need to engage more community-based Deaf organizations in the pilot. Only one site partnered with a local Deaf organization and that site completed the most free tax returns.

FINDINGS AND RECOMMENDATIONS

FINDING #1

Build Trusted Networks: The Deaf and non-Deaf systems collaborating to provide free tax assistance reported the need for training and education to better integrate mutual goals, provide effective tax assistance and build sustainable trusted networks.

- a) VITA site coordinators reported the need for education for their staff and volunteers on how to best serve Deaf taxpayers. Issues of communication, trust building and etiquette were raised. Some reported being uncomfortable and not knowing how to interact because of language barriers and communication styles. During the early stages of the pilot Deaf partners would send emails to non-Deaf partners that were viewed as blunt and without nuance. As the project progressed everyone became more comfortable understanding the various “nuances” associated with the use of two very different languages – ASL and English.
- b) Hearing VITA partners were new to the VRS technology used for the numerous national conference calls required to develop the pilot. It soon became obvious that a protocol was needed so that when each person spoke they introduced themselves so the interpreter listening could fully communicate to the Deaf colleagues on the call who was speaking. This was not easily accomplished

as many hearing partners often forgot to stop and announce their name and organization before speaking.

- c) Site coordinators and Deaf partners reported the need to engage more community-based Deaf organizations in the pilot. Only one site partnered with a local Deaf organization and that site completed the most free tax returns. This site reported that the Deaf taxpayers who participated “felt very empowered” to be doing their own taxes for the first time. Due to limited start-up time and resources few relationships were built with community-based Deaf organizations prior to the start date of the pilot other than introductory phone calls and a few meetings. VITA partners reported the need to engage more Deaf organizations in the community as champions to assist with building trust, providing education about the benefits of using the services, and the availability of free tax credits and provisions. NDI and DeafTax.com partners collaborated with site partners in outreach to Deaf organizations and in three cities held face-to-face meetings. It became obvious that more time was needed to educate about the pilot than was available. However, it was decided to move forward with partners in the community willing to participate.

d) VITA leads reported that some Deaf taxpayers thought the pilot was a “hoax” having never before been offered any free services such as free tax assistance. At one site it was noted that Deaf taxpayers called the Deaf tax preparer (who they knew and had heard about through word of mouth) before going to the site or scheduling a tax appointment to make sure it was legitimate.

RECOMMENDATION #1

Local Level: Convene “Getting to Know You” sessions on a city-by-city basis to establish relationships and build common agendas for expanding outreach across community-based VITA organizations and the Deaf community. These sessions would allow partners to create check lists of what the Deaf community needed the VITA community to know and what the VITA community needed the Deaf Community to know to build trusted networks and partnerships. NDI would take the lists from each city and create a “Getting to Know You” template for working with diverse community groups that could be used as a training tool for all VITA sites nationally. These lists would include a variety of cultural competencies specific to working with the Deaf and VITA communities. Each new pilot city for 2010 must have a Deaf organization as a champion with a dedicated volunteer in order to participate. VITA sites need to find Deaf volunteers who are retired or working who are interested in assisting with this pilot. Resource issues – who pays for certification training and volunteer education for Deaf volunteers’ needs national attention and policy.

National Level: Create national partnerships with lead Deaf organizations both public and private (National Association of the Deaf, the National Deaf Business Institute, IRS Deaf Resource Group, Schwarz Financial LLC/DeafTax.com) and organize a strategic national education campaign on accessing free tax filing assistance, where to get help and why it is important. This campaign would provide the VITA coalitions with a strong endorsement of the work and build trust and education at the local level. NDI was offered assistance in publicizing the pilot nationally through IRS Communications during the 2009 tax filing season but declined because of the slow upstart of the pilot and fear that there would be more Deaf taxpayers requesting assistance than there were Deaf VITA certified tax preparers.

FINDING #2

Prioritize Roles and Responsibilities: The Deaf and non-Deaf systems involved in operationalizing the pilot reported the need to better clarify and coordinate 1) volunteer roles, responsibilities and allocation of time; 2) IT and VRS phone installation and technical assistance; 3) volunteer training; and 4) the scheduling of appointments to optimize the time and use of resources.

a) Initially NDI and DeafTax.com hosted a call with cities identified as possible pilot site candidates. Once calls were held with each city a series of national calls were held with all five cities, NDI, IRS SPEC, DeafTax.com and IRS/DEAF Employee Affinity Group. A list of “most common questions” was developed and disseminated

as each city explored challenges and shared experiences². These calls were held in late December and early January. VITA partners reported the challenges of getting the pilot up and running when starting at such a late date. VITA partners also reported that the intake process of gathering information from the Deaf taxpayer took more staff resources than initially expected. Pilot sites that did not have a Deaf organization partner reported that volunteers requested that they be provided with more education and information for working with a Deaf taxpayer.

b) Deaf preferences for tax preparation assistance were unclear and unknown by many VITA volunteers. Some Deaf taxpayers wanted to use the written word to communicate their tax needs as they had always done (especially older Deaf taxpayers); some wanted to use TTY the method where one dials a phone number and an operator communicates the message and then responds back; others wanted to use the VRS technology where the Deaf taxpayer and Deaf tax preparer were communicating in real time both using ASL and viewing each other on the screen of the phone. A few Deaf taxpayers reported not knowing about the new VRS technology and were interested in learning more. VITA volunteers reported that they were not well acquainted with the communication models/styles requested by the Deaf taxpayer.

c) Pilot sites did not receive the VRS phones until February due to an unexpected delay. Most sites received their phones in early February but then had to coordinate installation on a dedicated internet line³. Most cities reported that many of their taxpayers had already accessed the free tax assistance by mid February. The IT company that offered to place the VRS phones in the pilot cities at no cost also offered free technical assistance that once utilized by the pilot cities allowed for optimal use. It was suggested that this process begin much earlier so to avoid the delay.

d) Sites that were using their VITA volunteers requested more information and knowledge about serving Deaf taxpayers. Few volunteers understood the use of ASL as a primary language and would have appreciated more information and assistance that would have optimized their contact with the Deaf taxpayer. Few volunteers understood Deaf taxpayer preferences in filing a return.

e) Due to limited resources the pilot used a “Google calendar” to schedule appointments. Sites reported some “no shows” but all in all the process worked as well as expected. The Deaf tax preparers reported they could have done many more returns than were booked. The pilot was cautious about marketing the initiative because of the upstart IT challenges. The last thing the pilot wanted to do was to advertise free tax assistance and then not be able to deliver. Scheduling of tax assistance appointments favored daytime over evening hours.

² See attached Document B - Most Frequently Asked Questions.

³ See Attachment C - Installation Requirements for Snap!VRS Ojo! Phone

RECOMMENDATION #1

Local Level: Convene pilot sites by early fall of 2009 to design outreach strategies for 2010 tax filing season. Provide sites with clear protocol for serving Deaf taxpayers. All VRS technology should be on site and be ready to use by December 15th in all participating pilot cities. A training module should be available to VITA volunteers on serving Deaf taxpayers. This module should incorporate the various methods used by Deaf taxpayers from the written word, VRS technology, or TTY.

Systems Level: NDI and partners should meet in early Fall of 2009 to build strategic plan for assisting VITA pilot sites in training volunteers by November 1, 2009. NDI – Provide VITA sites with education module for training volunteers for working with Deaf taxpayers whether through use of the video phone technology, ASL or TTY. Develop master calendar for Deaf pilot to be fully operational by December 15, 2009. In addition, pilot sites reported that Deaf taxpayers preferred both working hours and evening appointments so sites will have to consider this when scheduling their services. Although there are over 100,000 VRS phones in homes where Deaf people live, a number of Deaf individuals using the free tax assistance did not have one and asked for training to use the new technology and asked how they could have one put in their home. Pilot site partners also asked that the new Deaf volunteers be trained by November 1st for intake assistance and that at least three new certified Deaf tax preparers be added.

FINDING #3

Multiple Free Tax Assistance Methods Being Used for Serving Deaf Taxpayers: Pilot cities identified preferences of Deaf taxpayers to include 1) Use of VRS phone with Deaf taxpayer receiving free tax assistance from a Deaf tax preparer remotely (Lexington Site, NYC and Charlotte, NC); 2) Co-located VITA sites that provide both Deaf taxpayers (in addition to non-Deaf taxpayers) free tax assistance services. For Deaf taxpayers this could mean tax preparation using written English communication, lip reading, TTY, or ASL interpreters (Rochester, NY, Harlem, NYC and Jacksonville, FL).

Individual Level: A few Deaf taxpayers preferred using written English to ensure the confidentiality of their tax return. Most however, were very empowered by the opportunity to communicate “Deaf to Deaf” in their tax preparation activity and use the VRS phones. A few Deaf taxpayers asked for assistance in learning how to use the VRS phones and were very excited about this new technology and asked how to get this service in their homes. One site coordinator reported that the quality of the returns was better due to the use of the first language in preparation.

Systems Level: There is no prior research that describes the various preference and characteristics of Deaf taxpayers for receiving free tax assistance and/or information. Many non-Deaf organizations are unfamiliar with the accommodation needs of Deaf taxpayers.

RECOMMENDATION #1

NDI conduct research on the tax filing preferences of Deaf taxpayers in partnership with IRS. NDI provide pilot cities with a clear menu of accommodation methods and procedures for volunteers working with Deaf taxpayers. NDI work with Disability Business Technical Assistance Centers (DBTACs) and other organizations that are experts in providing accommodation education to communities working with people of all abilities.

FINDING #4

Develop New IRS VITA Regulations to Serve Deaf Taxpayers: In order to be in compliance with VITA regulations concerning the operation of quality sites, IRM 22.30.1.4.8.3.2 needs to be revised to include the various methods of non-traditional tax preparation proposed where the taxpayer and the tax preparer are not physically located at the same site. This would include the use of a video phone where they are speaking in ASL to each other as well as the use of a relay interpreter.

A number of Deaf taxpayers who did have the VRS technology at home reported they would have preferred to call into the remote preparation sites and have returns done without the requirement of coming in face to face at a specified location. Currently, this “remote” way of doing tax preparation falls outside the VITA regulations that require “face to face” preparation and the requirement to fill out an intake document. Deaf taxpayers with the VRS

phones in their homes reported they would prefer self preparation using laptops at home or be connected to VITA within state as was tested in Colorado. The model would allow for VRS owners to call-in from home to Deaf VITA remote preparers and the verification work could be done in advance and faxed or scanned to the remote preparers to remain in compliance with VITA.

RECOMMENDATION #1

The new VRS technology introduces new opportunities to serve more taxpayers for the VITA initiative and will require a redesign of existing VITA regulations that were written before this technology was available. Presently the pilot has adapted the Rural VITA Regulations although no formal approval of these has been made by IRS. NDI recommends that another year of pilot demonstration is needed before new VITA regulations or amendments are introduced with specific implications for Deaf tax preparation.

In addition, this finding has broader implications for the 25% of taxpayers that reported “difficulty leaving their home” in the IRS Benchmark Study⁴ (Page 9). IRS Wage & Investment Research recommended (Page 31) that home tax assistance might be considered and the use of video technology, not necessarily the one used here with real time interpreters, could increase the number of taxpayers reported not filing returns (over 1 million in 2007) with disabilities.

⁴ IRS Benchmark Study (2007). Disabilities Research Report: Characteristics of Disabled Taxpayers Ages 18 to 59: Study of Filing patterns and Preferences for Receiving Tax Information & Services. Internal Revenue Service Wage & Investment Research: Prepared by Stakeholder Partnerships, Education & Communication, May 4, 2007.

FINDING #5

Develop Clear Protocol for the Systems Providing Accessible Communications to Deaf Taxpayers: Individual taxpayers who are Deaf reported challenges in accessing information about their tax needs when using public systems. Whether a free 2-1-1 call-in service or IRS Walk-In Center it was unclear what accommodations were being made on behalf of Deaf taxpayers and what training and/or instruction employees providing these public services were given to assist Deaf taxpayers.

Individual Level: Deaf taxpayers participating in the pilot reported challenges when trying to access VITA hotlines and Walk-In Services for information about tax filing or questions about their returns. Communication methods used by employees providing public service information about free tax assistance varied for the Deaf taxpayer. One employee working in a public system told a Deaf taxpayer that they could not make any accommodations. It was reported that analog technology continues to dominate the menu of assistive technology options for Deaf taxpayers although it is relatively obsolete given that the United States has gone digital.

System Level: The transition from analog to digital technology for Deaf Americans is transformational. One report compared it to the difference between using Morse Code and the telephone for the hearing. Different companies

are promoting Video Relay Services (VRS) with different protocols and only recently has interoperability become mandated by the FCC. (This means that multiple devices must be able to communicate with each other regardless of provider.)

RECOMMENDATION #1

Adapt a tested and approved menu of communication styles for the Deaf taxpayer that reflects the new digital technology advancements as well as assistive technology devices. NDI, IRS and other partners conduct research on the state of communication devices being used to provide Deaf taxpayers with tax assistance in Walk-In Centers and other public non-profit organizations providing outreach (United Way 2-1-1). In addition, IRS W&I Research conduct national survey on the characteristics and profiles of Deaf taxpayers and develop training for all employees providing free tax assistance services to Deaf taxpayers.

One method would be to equip all IRS Taxpayer Assistance Centers (TACs) with VRS phones and provide a separate toll-free number to IRS call centers that are also equipped with VRS phones and staffed by employees proficient in ASL. This could be carried one step further by providing a separate toll-free number to the general public for use only by taxpayers using VRS technology.

RECOMMENDATION #2

Explore existing policy for systems providing free public services to Deaf taxpayers to understand the financial and accommodation obligations. An informal national workgroup of individuals working on this project has formed to explore gaps in public policy for meeting the accommodation needs of Deaf taxpayers attempting to use free tax assistance systems. Provide technical assistance on public access laws, accommodation service access (the communications assessment questionnaire, how to get an interpreter, how to get a VRI (video remote interpreter) and so on.

FINDING #6

Develop Strategic Marketing and Outreach to Deaf Taxpayers and their Families about Free Tax Services and Credits: Taxpayers who are Deaf that participated in this pilot, including IRS DEAF Employee Resource Group members said it was an “awesome experience” and that they wanted to learn more about available tax credits and provisions and other asset building opportunities.

RECOMMENDATION #1

Work closely with IRS Alternative Media Center to develop information on tax filing credits and deductions for deaf taxpayers. Develop online certified VITA training using video with interpreters and other Deaf certified tax preparers so more Deaf individuals can become certified.

RECOMMENDATION #2

- a) Provide Community Based Tax Coalitions with education and training on the best media and communication methods for reaching Deaf taxpayers and their families.
- b) Provide technical assistance on public access laws, accommodation service access (the communications assessment questionnaire, how to get an interpreter, how to get a VRI (video remote interpreter) and so on. National Association for the Deaf (NAD) could be contacted for this.
- c) Write articles in the View, the RID (Registry of Interpreters for the Deaf to raise awareness of VITA, and the voluntary nature of the program as Certified Interpreters and those following the RID Code of Professional Conduct have to be very careful with volunteering their services. More interpreters would be willing to volunteer if they understood that VITA sites are foundationally grass roots voluntarily driven.

RECOMMENDATION 3#

Develop public resource library for serving Deaf taxpayers.

RESOURCES FOR DEAF TAXPAYERS

Communication Cards

http://www.gachi.org/pdfs/Communication_Cards_Catalog.pdf

Communication Assessment Form (See examples below.)

- a. ADA Business Brief: Communicating with People Who Are Deaf or Hard of Hearing in Hospital Settings (www.ada.gov/hosp-combr.htm)
- b. Language Identification Card: <http://www.ocjs.state.oh.us/Publications/Pocket%20Card.pdf> (includes ASL)
- c. Pictograms for Hospital Communication (<http://www.ada.gov/archive/hospict.htm>) – This is a copyrighted document, however, permission might be sought for duplication.

Sample Language Policies and Procedures in Other Professions (See examples below.)

- A Patient-centered Guide to Implementing Language Access Services in Healthcare Organizations (<http://www.omhrc.gov/Assets/pdf/Checked/HC-LSIG.pdf>)
- Sample for Discussion Purposes Planning Tool: Considerations for Creation of a Language Assistance Policy and Implementation Plan for Addressing Limited English Proficiency in a Law Enforcement Agency (http://www.lep.gov/resources/Law_Enforcement_Planning_Tool.htm)

- Model Policy for Law Enforcement on Communicating with People Who Are Deaf or Hard of Hearing (<http://www.ada.gov/lawenfmodpolicy.htm>)

Other Useful Resources

- a. Communicating with People Who Are Deaf or Hard of Hearing ADA Guide for Law Enforcement Officers (<http://www.ada.gov/lawenfcomm.htm>)
- b. ADA Best Practices Tool Kit for State and Local Governments - Chapter 3 - General Effective Communication Requirements Under Title II of the ADA (<http://www.ada.gov/pcatoolkit/chap3toolkit.htm>)
- c. Examples of Limited English Proficiency Guidance (http://www.usdoj.gov/crt/lep/guidance/guidance_index.html)
- d. HUD Produces Video Messages For Deaf And Hard Of Hearing (<http://www.hud.gov/news/release.cfm?content=pr09-011.cfm>)
- e. FCC Consumer Facts: Telecommunications Relay Services (<http://www.fcc.gov/cgb/consumerfacts/trs.html>)

DBTAC Resources

ASL Podcast (<http://asl.disabilitylawlowdown.com>). Thank you to Southeast DBTAC for supplying this helpful information.

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REI Tour/DeafTax.com VITA Pilot

Procedure Manual

February 2009



Welcome

Thank you for agreeing to participate in this innovative pilot that is bringing free tax assistance to the Deaf Community. Since the summer of 2008, we have collaboratively partnered to understand how to best include taxpayers who are Deaf in existing free tax services using the latest technology. The National Disability Institute is proud of your efforts – from our first national call that produced a list of questions that we continued to build on each month - to this procedural manual that every one of you has made a contribution.

The REI Tour/DeafTax.com VITA Pilot is moving forward despite technology issues, scheduling challenges and communication issues. Partners have joined the pilot at mid point and some of you have been with us since the beginning. The Pilot will make available free Federal and state income tax preparation utilizing technology so that returns can be prepared by certified VITA volunteers fluent in ASL speaking (signing) directly with the taxpayer using video phones.

The National Disability Institute recognizes your pioneering spirit and willingness to take on this work and will honor your contributions at its annual National Press Club Celebration in October 2009 in Washington, DC. A report will be produced that will identify the challenges and successes of this work and how best to move forward with this initiative in 2010.

Rest assured that even though the two preparation site EFINs will get the count for the returns prepared, each Intake Site will have the number of tax returns prepared through their site added to their official number.

Thank you for your support and innovative spirit – it is deeply appreciated and will not go unnoticed.

Johnette Hartnett
Director, Real Economic Impact Tour

Deaf Tax Pilot Initiative

Who are the principal sponsors?



The Real Economic Impact Tour (REI Tour) is a national, public/private initiative assisting low income persons with disabilities with asset building strategies, free tax preparation and filing assistance. In the 2008 filing season REI Tour partners prepared over 90,000 tax returns in 62 cities. Over \$81 million in refunds were received by persons with disabilities. The primary partners are National Disability Institute and Internal Revenue Service Stakeholder Partnerships, Education and Communication (SPEC).



DeafTax.com is a tax preparation and financial services firm located in Bethesda, MD that is donating \$30,000 worth of professional tax preparation time to serve the low income deaf taxpayer population through this first year pilot using the innovative **Ojo** videophone technology provided by **Snap!VRS**, of Pearl River, NY. Joshua Beal, the founder of DeafTax.com says, "It is our obligation to empower those deaf taxpayers who have been left behind in sharing the prosperity that America stands for."

Who are the principal partners?



Rochester Institute of Technology and the National Technical Institute for the Deaf are joining this initiative by offering an internship to their students. They must complete 350 hours for this work to satisfy as a co-op. Saunders College of Business does approve the volunteer co-op as long as the student works the needed hours and gets an evaluation from the supervisor. This work will be as certified VITA volunteers preparing taxes in Rochester. See http://www.ntid.rit.edu/nce/jobs_search.php?view=644 for more information. Joshua Beal will coordinate this site.



Deaf Empowerment and Advocacy Forum (DEAF)
This group's mission is to provide Deaf and Hard of Hearing employees with a voice in the IRS, and to encourage the inclusion of the cultural and linguistic principles of the Deaf and Hard of Hearing in the workforce. This group has stepped forward to recruit volunteers to become certified VITA volunteers to prepare taxes in Bethesda. See [IRS/DEAF](http://www.irs/deaf) for more information about the organization. Charles (Pike) Sterling will coordinate this site.

Where are the pilot cities?

Rochester, NY	New York, NY	Jacksonville, FL	Charlotte, NC	Denver, CO
C.A.S.H. (Creating Assets, Savings, and Hope) United Way of Greater Rochester A community coalition providing opportunities to workers with low incomes to obtain, maintain, and grow economic assets.	Harlem Independent Living Center, 289 Saint Nicholas Avenue Suite 21, Lower Level Between 124 th and 125 th Streets.. Lexington Vocational Svcs Center, 30 th Ave. and 75 th St., Jackson Heights	RealSense Prosperity Campaign, Jacksonville Workforce Center	Family Financial Literacy Coalition/Community Link	Colorado Disability Economic Initiative Denver Workforce Center



The IRS/Deaf Empowerment and Advocacy Forum envisions a fully integrated and fully accessible workforce in which IRS employees who are deaf and hard of hearing can achieve enhanced employment outcomes and ongoing independence with their cultural and linguistic values remaining intact. Every individual will be able to participate fully in all aspects of the Service including decision-making processes and the administration of programs and projects. Through full partnership and participation, learning, continuous improvement, leadership and creativity, Deaf and Hard of Hearing IRS employees will be empowered to provide their customers with the highest quality services.

To provide Deaf and Hard of Hearing employees with a voice in the Service and to promote the inclusion of the Deaf and Hard of Hearing and their cultural and linguistic principles in the workforce.

Toward this end, the IRS/DEAF will work as a resource within the Service to:

- increase workforce development and training;
- promote awareness and application of Deaf and Hard of Hearing values and principles;
- encourage mentoring and networking;
- provide a full spectrum of qualified leadership skills;
- disseminate seamless business solutions in order to solve business challenges;
- foster competent, long-term, high-impact methods of empowerment to exceed performance expectations;
- develop resources to promote organizational effectiveness for Deaf and Hard of Hearing employees,
- cultivate communication access to achieve a fully integrated workforce; and
- conduct research and development on key Deaf and Hard of Hearing issues of interest to the membership and supporting constituents.

IRS/DEAF is a 501(c)3 nonprofit professional organization. For more information, please visit www.irsdeaf.org.



REI Tour/DeafTax.com VITA Pilot Glossary

- Sponsor** Entities providing direct financial support
- Real Economic Impact Tour (REI Tour) - a project of National Disability Institute (NDI) and IRS/SPEC
 - DeafTax.com - a tax preparation segment of Schwartz Financial Services LLC
 - SNAP!/VRS – provider of Ojo phones
- Partner** Entities recruiting volunteers to become certified VITA preparers
- Rochester Institute of Technology (RIT) and the National Technical Institute for the Deaf
 - Deaf Empowerment and Advocacy Forum (DEAF) DEAF/IRS
- Preparation Site** Sites in Rochester, NY and Bethesda, MD where certified volunteers will prepare federal and state tax returns
- Intake Site** Sites in Rochester, NY; New York, NY; Jacksonville, FL; Charlotte, NC; Denver, CO where volunteers will welcome deaf taxpayers.

TABLE OF RESPONSIBILITIES

WHAT	WHO
Overall Coordination	REI Tour – Judy Stengel
Recruit volunteers for certification	RIT, Josh Beal and DEAF/IRS
Train volunteers for certification	Arranged by SPEC relationship manager
Schedule volunteers	Volunteers coordinate with Judy Stengel at jstengel@ndi-inc.org
Recruit intake sites	Coalitions in five pilot cities – sites need volunteers, internet access with printer, fax machine or scanner
Recruit intake volunteers	Coalitions in pilot cities – do not have to be certified
Order Ojo phone	Intake sites order through Josh Beal at Joshua@schwarz-financial.com
Order TaxWise® Online Software	IRS/SPEC relationship manager

Market availability	Coalitions in pilot cities
Instruct use of Google calendar	Judy
Make preparation appointments	Coalitions in pilot cities beginning January 15, 2009
Obtain necessary signed consent forms.	Volunteer in intake site assisting deaf T/P
Verify IRS intake sheet, Form 13614-C	Volunteer in intake site assisting deaf T/P
Verify identity	Volunteer in intake site assisting deaf T/P
Fax or scan and e-mail source documents to prep site	Volunteer in intake site assisting deaf T/P
Prepare return	Certified volunteer in preparation site
Quality review return	Certified volunteer in either intake or preparation site
Mail source documents to prep site (Addresses below)	Intake site coordinator
Transmit returns	Preparation site coordinators, Josh Beal and Charles Sterling
Retain documents according to IRS e-file procedures	Preparation site coordinators, Josh Beal and Charles Sterling

Pertinent Contact Information

Joshua Beal (JB) - Rochester	Charles Sterling - Bethesda
Joshua Beal Schwarz Financial Services c/o DeafTax.com 1573 Elmwood Ave., #4 Rochester, NY 14620 Ojo VP: 1-202-403-1115 Sorenson VP: 1-866-643-9990 Fax: 301-718-0605 E-Mail: VITA@deافتax.com	Charles Sterling Schwarz Financial Services c/o DeafTax.com 4405 East West Highway, Suite 502 Bethesda, MD 20814 Ojo VP: 1-202-555-2020 Sorenson VP 1-866-819-7030 Fax: 301-718-0605 E-mail: VITA@deافتax.com



REI Tour/DeafTax.com VITA Pilot Intake Site

Personnel

- Several volunteers, not necessarily certified

Equipment/Resources

- Computers with high-speed Internet connectivity
- Ojo phone
- Dedicated Internet line whether cable or DSL for Ojo video phone
 - Bandwidth FYI - The Ojo default bandwidth setting is configured for 150kbps. At this setting, up to 10 simultaneous Ojo calls can be supported on a single T1 Internet connection. For optimal video phone call performance, we recommend a minimum of 150 kbps. The bandwidth setting can also be reduced to increase simultaneous calls.
- Fax machine or scanner and computer to transmit copy of original documents from taxpayer and receive completed return from preparer.

Supplies

- Intake sheets
- Consent forms



REI Tour/DeafTax.com VITA Pilot Preparation Site

Personnel

- One VITA certified site coordinator
- Several VITA certified tax preparation volunteers

Equipment/Resources

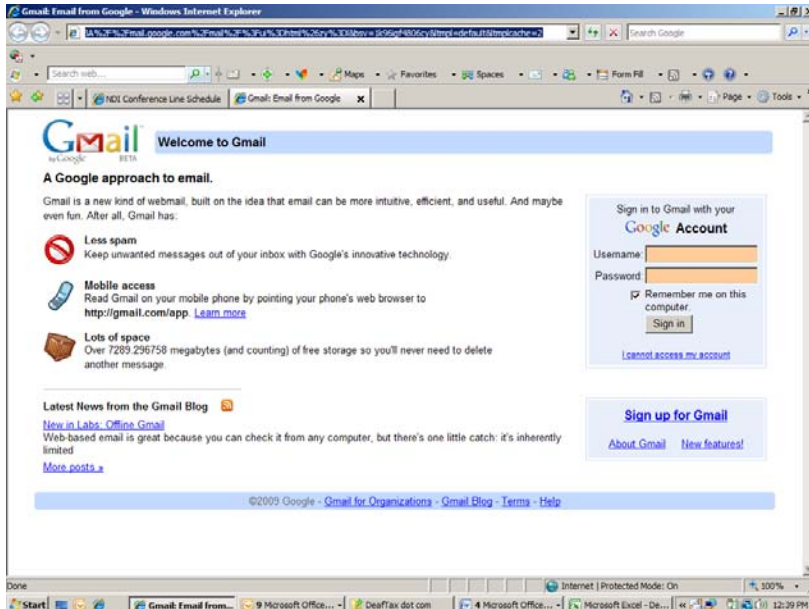
- Computers with high-speed Internet connectivity
- TaxWise® Online license
 - **TaxWise® System Requirements**
 - Microsoft® Windows XP (with the latest service pack) or Microsoft® Windows Vista (32-bit operating systems only)
 - 2.0 GHz processor or higher
 - 1GB or more of RAM
 - 1GB of available hard drive space (per tax year)
 - 32-speed or higher CD-ROM Drive
 - Super VGA 1024 x 768, High Color/16 Bit display or better
 - Microsoft® Internet Explorer 7.0 (with the latest service pack)
 - A high-speed Internet connection (DSL, cable modem, or T1/T3)
 - A file backup system (backup tape, removable hard drive, CD-R, DVD-R, or similar)
 - PCL6 compatible **printer**. For the best printing results, use a laser printer. Ink jet printers can be used but they may print slowly.
 - Ethernet network card (required for network installations only)
 - Adobe Reader (version 8.1 or higher)
- Ojo phone
- Dedicated Internet line whether cable or DSL for Ojo video phone
 - Bandwidth FYI - The Ojo default bandwidth setting is configured for 150kbps. At this setting, up to 10 simultaneous Ojo calls can be supported on a single T1 Internet connection. For optimal video phone call performance, we recommend a minimum of 150 kbps. The bandwidth setting can also be reduced to increase simultaneous calls.
- Fax machine or scanner and Internet connection to receive copy of original documents from taxpayer and send completed return for approval.

Supplies

- Secure filing place for taxpayer documents.

REI Tour/DeafTax.com VITA Pilot Calendar Procedures

1. Go to <http://mail.google.com>



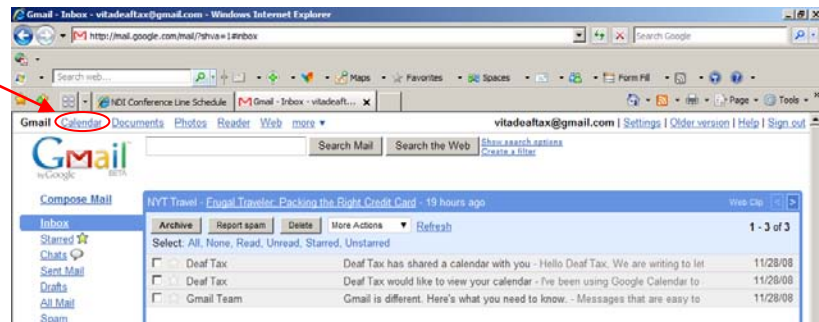
2. Username is: VITADeafTax

3. Password is: DeafTax1234

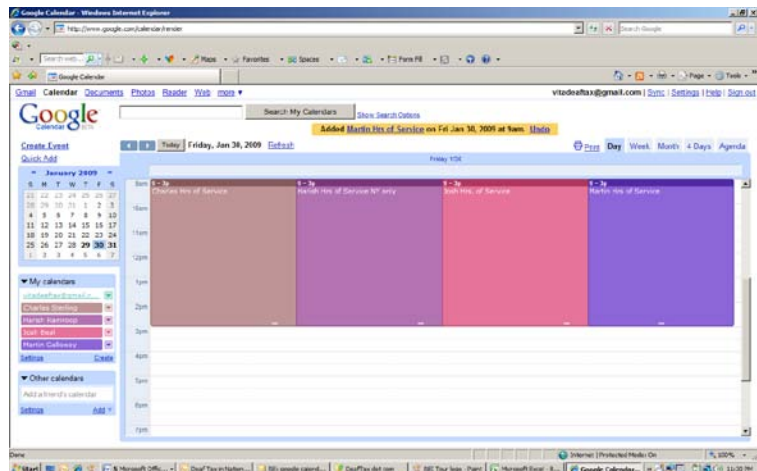
4. If you click the “Remember me...” box you won’t have to sign in each time you visit.

5. Next screen:

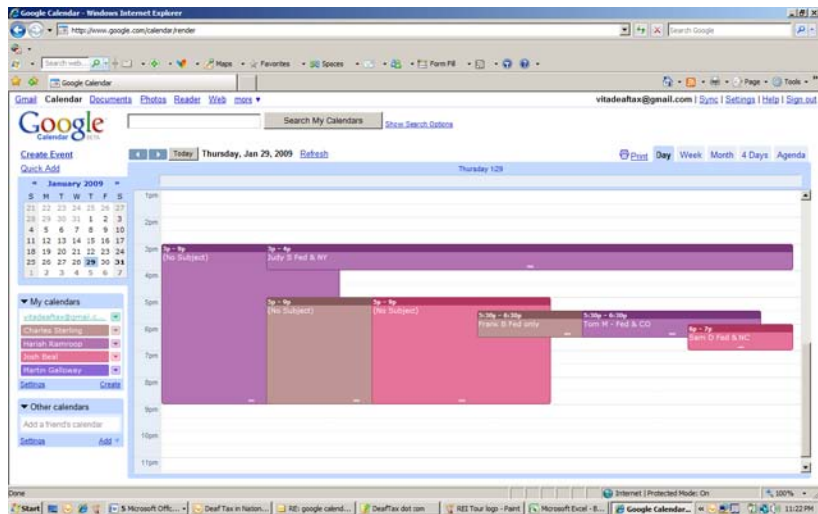
6. Click on “Calendar”



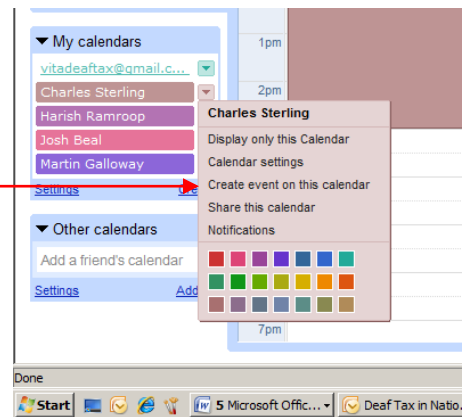
7. January 29th should look like this:



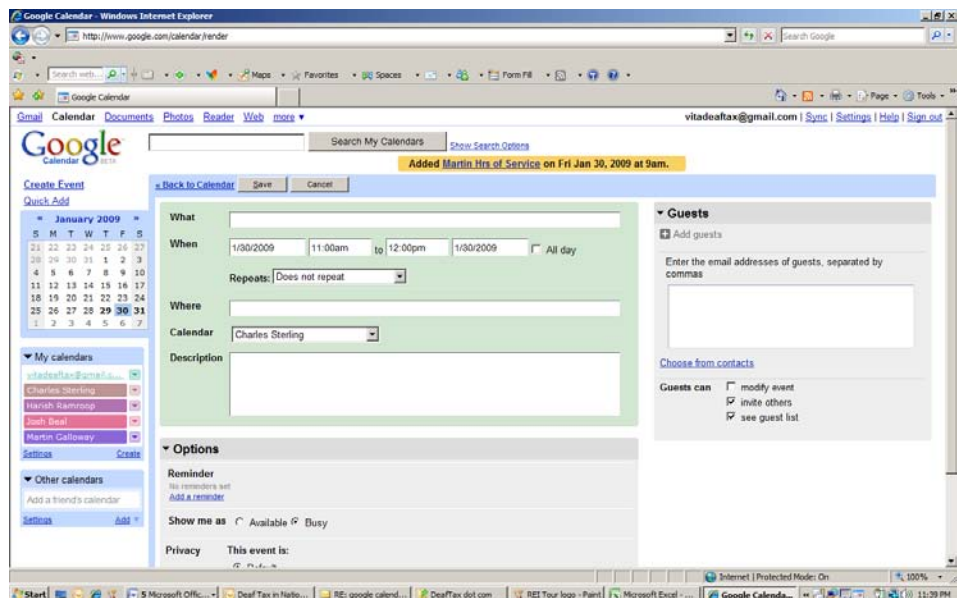
8. Now go to January 30th and it should look like this:



9. Assume that the Lexington Site in NYC wants an appointment on Friday, 1/30 at 11:00 am to prepare Tom Gee's Federal and New York taxes. No one is currently busy at that time. So go to the drop down arrow next to Charles' name and click on "Create event on this calendar".



10. This should pop up:



11. In the What box type
 “NYC Lex, Gee T, VP
 301-718-0605 – V 202-
 250-1301”
 Type in the
 appointment time
 Be sure to mark the
 “Busy” box then click
 “Save”

What NYC Lex, Gee T, VP: 301-718-0605 - V: 202-250-1301

When 1/30/2009 11:00am to 12:00pm 1/30/2009 All day

Repeats: Does not repeat

Where

Calendar Charles Sterling

Description

Options

Reminder
 No reminders set
[Add a reminder](#)

Show me as Available Busy

Privacy This event is: Default

Now you are showing an appointment for Charles at 11:00 – Charles is brown, appointment is brown.

Google Calendar - Windows Internet Explorer

http://www.google.com/calendar/ender

vitadeaftax@gmail.com | Sync | Settings | Help | Sign out

Added NYC Lex, Gee T, VP: 301-718-0605 - V: 202-250-1301 on Fri Jan 30, 2009 at 11am. Undo

Friday, Jan 30, 2009 Refresh

Print Day Week Month 4 Days Agenda

Friday 1/30

Time	9am - 3p	9 - 3p	9 - 3p	9 - 3p
9am	Charles Hrs of Service	Harish Hrs of Service NY only	Josh Hrs. of Service	Martin Hrs of Service
10am				
11am				NYC Lex, Gee T, VP: 301-718-0605 - V: 202-250-1301
12pm				
1pm				
2pm				
3pm				
4pm				
5pm				
6pm				
7pm				

My calendars: vitadeaftax@gmail.com, Charles Sterling, Harish Ramroop, Josh Beal, Martin Galloway

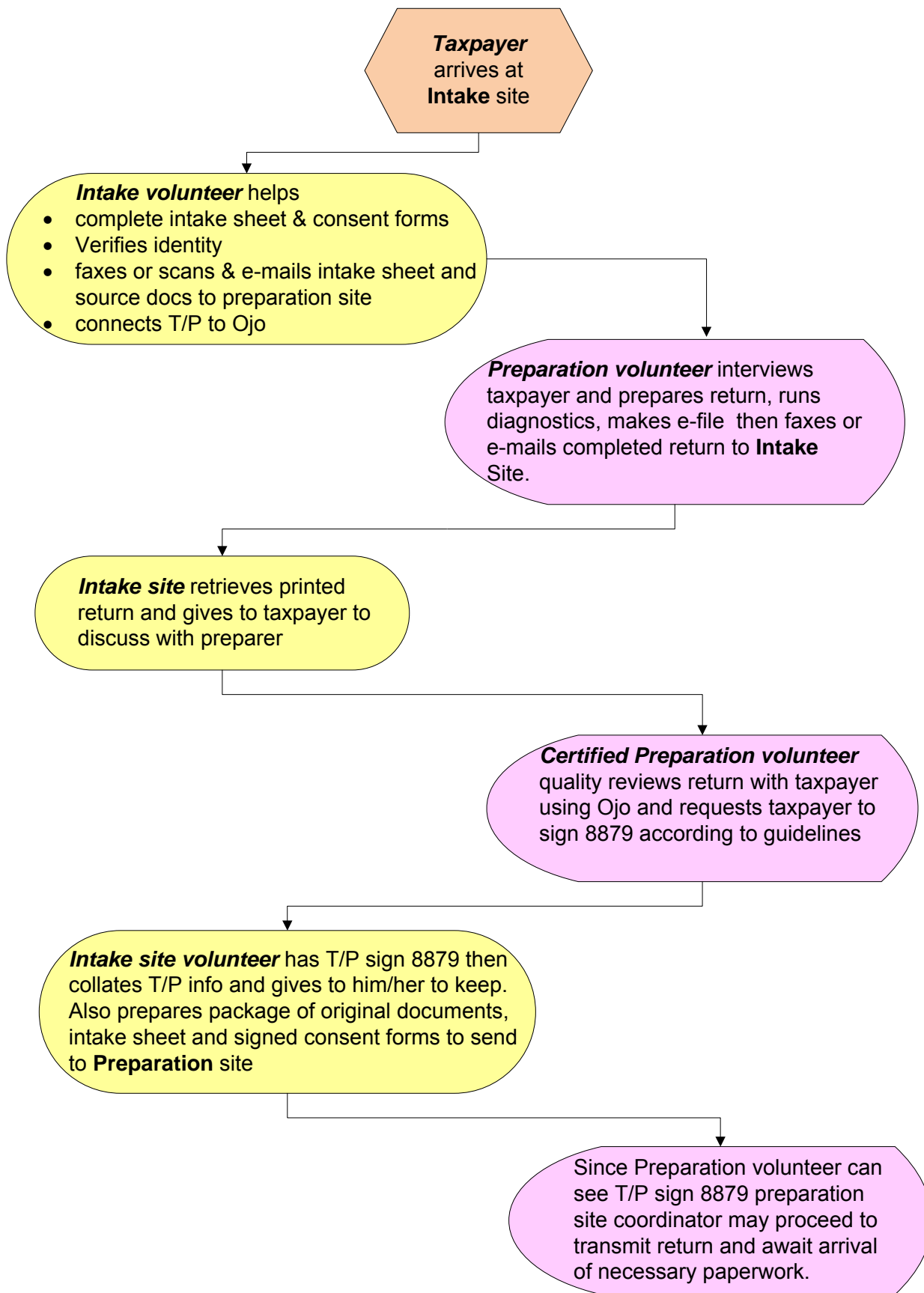
Other calendars: Add a friend's calendar

Done

Internet | Protected Mode: On | 100%

Start | 5 Microsoft Office... | Deaf Tax in Natio... | REI: google calend... | DeafTax dot com | REI Tour logo - Paint | Microsoft Excel - ... | Google Calenda... | 11:59 PM

12. You can play with the calendar as much as you want to practice, but please do it on the January days. DON'T practice on February, March or April. You can always go back and delete when you are finished practicing.
13. The format for the “**What**” line is: (**City** and **site** [if more than one in the city] requesting the appointment), (**Client name** [last, first]), (**Intake Site Video Phone** [VP] number), (**Intake Site Voice** [V] number)
14. As soon as appointment is made or at the time of the appointment, you can e-mail the client’s documents
To: vita@deaftax.com
Subject: (**City** and **site** [if more than one in the city] requesting the appointment), (**Client name** [last, first]), (**Date of transmission**)
- Example:
Subject: NYC, Lexington, Gee T, 02.10.09
15. Call or e-mail if you need help
Judy Stengel
jestengel@ndi-inc.org
316-619-2776





REI Tour/DeafTax.com VITA Pilot Procedures

The **intake sites** will be located in Charlotte, NC, Denver, CO, Jacksonville, FL, New York, NY and Rochester, NY and will be equipped with a computer; video phone and either a scanner or fax machine. Due to unavailability of certified volunteers who speak fluent ASL, no tax returns will be prepared at the designated intake sites (except for Rochester).

An **uncertified volunteer** cannot provide any tax advice to taxpayers and should advise taxpayers to discuss any concerns with a certified volunteer.

The non face-to-face **preparation sites** will be located in Rochester, NY and Bethesda, MD.

- Any volunteer, certified or uncertified, at the **intake site** will:
 - Review taxpayers' proof of identity and source documents
 - Initiate the intake process by providing taxpayers with a Form 13614 Intake and Interview sheet to complete and consent form to sign.
 - Scan and e-mail or fax copies of taxpayers' documents for preparation of their return to the **preparation site**.
 - Connect taxpayer to Ojo. (Video Phone (VP) numbers will be posted on the Google calendar under the name of the preparer.)
- Certified volunteers at the **preparation site** will:
 - Review taxpayer's faxed/e-mailed personal information for preparing their tax return.
 - Conduct an interview while verifying the information included on the intake sheet and the supporting documents.
 - Prepare the return using the intake sheet and the supporting documents.
 - Run diagnostics and "make e-file"
 - Print the return and fax/e-mail to intake site
- The **intake site** will
 - Retrieve the printed return and give to taxpayer
 - Certified volunteers (either in the intake or preparation site) will conduct a quality review with taxpayers on every completed return.
 - Assist the taxpayer to sign the Form 8879 in accordance with normal Form 8879 procedures while still connected via Ojo.
 - Collate all taxpayer copies and give to taxpayer to keep.
 - Collate signed Forms 8879 and other consent forms with required attachments (W-2s, etc.) and send it to the tax **preparation site** coordinator for safe keeping.
- The **site coordinator** in Rochester and Bethesda will:
 - Follow normal VITA procedures for transmission, acknowledgements, rejects, safekeeping, etc.

No taxpayer documents will be stored at the **intake sites**.

Preparer Use Fields

1) Which Disability Initiative originated this contact?

- 1 – Charlotte, NC
- 2 – Denver, CO
- 3 – Jacksonville, FL
- 4 – New York, NY
- 5 – Rochester, NY

2) How did you hear about this free tax preparation site?

- 1 – I came here last year
- 2 – I heard an advertisement on the radio or television
- 3 – I saw a flyer or something in the paper
- 4 – I learned from a disability organization
- 5 – I learned from social service agency other than disability
- 6 – I learned from a governmental agency
- 7 – I learned from a Church/Temple/Mosque
- 8 – I learned from my employer or union
- 9 – Someone else told me
- 10 – Not sure
- 99 – Declined to answer

3) How did you have your taxes prepared last year?

- 1 – Didn't file taxes last year
- 2 – This is the first year I've filed
- 3 – Family or friend did them for free
- 4 – Did my own
- 5 – At a free tax preparation site (VITA or TCE)
- 6 – Paid someone and got an instant refund
- 7 – Paid someone but didn't go for the instant refund
- 8 – At an IRS office
- 99 – Declined to answer

4) What is your current living arrangement?

- 1 – Own home
- 2 – Rent home or apartment
- 3 – Live at a family member's home or apartment without rent
- 4 – Live at someone else's home or apartment without rent
- 5 – Live in an assisted living facility
- 6 – Live in a group home
- 7 – Currently homeless
- 8 – Other
- 99 – Declined to answer

5) Does the PWD have

- 1 – A checking account that they can access
- 2 – A savings account that they can access
- 3 – Both
- 4 – An Individual Development Account (IDA)
- 5 – Retirement savings
- 6 – A loan from a financial institution
- 7 – A rep payee, guardian or conservator
- 99 – Declined to answer

6) Does the PWD receive any public benefits?

- 1 – No
- 2 – Supplemental Security Income (SSI)
- 3 – Social Security Disability Income (SSDI)
- 4 – Both
- 5 – TANF
- 6 – Food Stamps
- 7 – Section 8 Housing Assistance
- 99 – Declined to answer

7) Which of the following has the PWD done in the last year?

- 1 – Used direct deposit for paycheck
- 2 – Used a credit card for purchases
- 3 – Used checking account for bills
- 4 – Used money orders for bills
- 5 – Used a check casher
- 6 – Used a payday loan
- 7 – Used a rent to own store
- 8 – None of the above
- 99 – Declined to answer

8) Level of education completed

- 1 – High school
- 2 - College
- 3 – Post Graduate
- 99 – Declined to answer

9) Have you ever used a video phone before today?

- 1 – Yes, I have one at home
- 2 – Yes, but not at home
- 3 – No

10) Please rate today's experience.

- 1 – Better than I expected
- 2 – About what I expected
- 3 – Neutral
- 4 – I was disappointed

Taxpayer Consent

Non Face-to-Face Volunteer Site

You are providing your information to a volunteer located at (insert name of your VITA site and city) so that a tax return can be prepared for the 2008 tax year.

The following information is needed to prepare your tax return:

- Copies of social security cards for all individuals listed on the return
- Photo ID of primary taxpayer
- Completed intake and interview sheet
- Forms W-2, 1099 and/or any other income documents
- Proof of expenses
- Any other documents required to prepare the return
- Signed notice

The above information will be (check one) scanned and e-mailed faxed to a certified volunteer. Your information may be retained by the preparation site until 12/31/2009. The intake site coordinators are:

Joshua Beal
Schwarz Financial Services
4405 East West Highway, Suite 502
Bethesda, MD 20814
Video Phone: 866-943-9990
OJO: 24.93.17.248

OR

Charles Sterling
Schwarz Financial Services
4405 East West Highway, Suite 502
Bethesda, MD 20814
Video Phone: 866-819-7030 or
301-718-0608 / 69.17.65.153
FAX 301-718-0604

A certified volunteer will:

- Conduct an interview based on information included in your supporting documents and the completed intake and interview sheet.
- Prepare the tax return, and return it to you by the method checked above for review.
- A certified volunteer at your site or the preparation site (via Ojo) will conduct a quality review.
- The volunteer at your site will assist you to sign the Form 8879 in view of the Ojo so that the preparing volunteer can see it.
- After your return is prepared and quality reviewed, the volunteer in your site will give you a copy of your return, Form 8879, your supporting documents, and your intake and interview sheet and forward the necessary documentation to the preparation site coordinator for safekeeping.

You (taxpayer) will:

- Complete the intake and interview sheet.
- Provide all taxable information to the intake site for preparing an accurate return.
- Review the return to ensure the names, social security numbers, addresses, banking information, income and expenses on the return are correct based on your supporting documents.
- Be interviewed by a certified volunteer.
- Participate in the quality review process.
- Sign Form 8879

Your information will not be sold or shared with anyone else. **If you do not want us to handle your personal information in this manner, we cannot prepare your tax return.**

If you agree to have your tax return prepared and your tax documents handled in the above manner your signature is required on this document. Signing this document means that you are agreeing to the procedures stated above for preparing a tax return for you. (If this is a Married Filing Joint return both spouse must sign and date this document.)

You (and Spouse) will need:

- *Proof of Identity*
- *Social Security Card or Individual Tax Identification Number (ITIN) letter for all individuals to be listed on the return*
- *Copies of ALL W-2, 1098, 1099 forms*
- *Amounts of any other income*
- *Child care provider's identification number*
- *Amounts/dates of estimated or other tax payments made, etc.*
- *Bank documents showing routing and account numbers if requesting direct deposit/debit*

Part I: Taxpayer Information

1. Your First Name		M.I.	Last Name		2. Date of Birth (mm/dd/yyyy)
3. US Citizen or Resident Alien <input type="checkbox"/> Yes <input type="checkbox"/> No	4. Legally Blind <input type="checkbox"/> Yes <input type="checkbox"/> No	5. Totally and Permanently Disabled <input type="checkbox"/> Yes <input type="checkbox"/> No		6. Occupation	
7. Spouse's First Name		M.I.	Last Name		8. Date of Birth (mm/dd/yyyy)
9. US Citizen or Resident Alien <input type="checkbox"/> Yes <input type="checkbox"/> No	10. Legally Blind <input type="checkbox"/> Yes <input type="checkbox"/> No	11. Totally and Permanently Disabled <input type="checkbox"/> Yes <input type="checkbox"/> No		12. Occupation	
13. Address			Apt #	City	State Zip Code
14. Phone Number and e-mail address Phone: () e-mail:			15. Could you or your spouse be claimed as a dependent on the income tax return of any other person? <input type="checkbox"/> Yes <input type="checkbox"/> No		
16. On December 31 st					
a. Were you: <input type="checkbox"/> Single <input type="checkbox"/> Legally Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed					
b. If married, did you live with your spouse during any part of the last six months of the year? <input type="checkbox"/> Yes <input type="checkbox"/> No					
c. Is your spouse deceased? If yes, provide the date of death. _____ (mm/dd/yyyy)					

Part II. Family and Dependent Information – Do not include you or your spouse.

Print the name of everyone who lived in your home and outside your home that you supported during the year.

Name (first, last)	Date of Birth (mm/dd/yyyy)	Relationship to you (son, daughter, etc.)	Number of months person lived with you last year	US Citizen, Resident of US, Canada or Mexico (yes or no)	Is the dependent a full time student? (yes or no)
(a)	(b)	(c)	(d)	(e)	(f)

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1964. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

Catalog Number 52121E

Form 13614-C (9-2008)

Please Complete Page 2, except Part V. A Certified Volunteer will confirm the information with you.

Printed Name _____ Printed Name _____
 Signature _____ Signature _____
 Date _____ Date _____

Frequently Asked Questions

Brief Pilot Project Description

This pilot will utilize real-time ASL interpretation and off-site tax preparers to bring free tax preparation to lower-income people who are deaf. Filers will make an appointment at a local hosting organization, which will be equipped with an OJO video phone (to provide the translation) and a computer and scanner (to scan the filer's financial documents and submit to the tax preparer). The tax preparers (Gallaudet University students, trained by and with the support of DeafTax.com) will prepare and submit the filers' return and transmit an electronic copy of the return to the filer.

The National Disability Institute and DeafTax.com are providing support for the project. In addition to New York City, other pilot cities include Jacksonville, FL; Denver, CO; Charlotte, NC and Philadelphia, PA.

Hosting Organizations and Equipment

Can organizations that already have a video phone be a part of this pilot? (For instance, the Harlem Independent Living Center uses Sorenson. Can they be a third New York City site?)

Yes.

Does the hosting organization have to provide the equipment for scanning the documents?

- Yes, though the National Disability Institute is generously giving a minigrant to the coalition which can help defray the cost for those organizations that do not have a scanner.
- Joshua mentioned the HP and Dell models are reliable and cost approximately \$200-250.

Is the hosting organization responsible for any other equipment?

- The hosting organization would need a computer with Internet (DSL) access.
- Sarah mentioned the ACCESS NYC new computer giveaway and said that could be an option for hosting organizations.

Can individuals with a videophone use this service?

Yes.

Which sites are interested in being hosting organizations?

- The Harlem Independent Living Center would like to host.
- Coalition members suggested the Lexington School for the Deaf in Queens and the Brooklyn Center for the Independence of the Disabled in downtown Brooklyn to host the other two sites. Follow-up is needed to explore their interest in hosting.
- VITA sites may be an option, if we do not find organizations that serve people who are deaf in time. Space may be an issue.
- We should designate the final two hosting organizations by the end of October to allow ample time for set-up and marketing.
- Johnette will contact the National Association for the Deaf and we can utilize their website to help us find contacts in New York City.

Are the phones mobile?

Yes.

Tax Preparation

Is there an income limit for free tax preparation?

- The members on the conference call agreed to offer the free tax preparation to filers earning \$45,000 or less, with or without children.
- We agreed on \$45, 000, even for childless filers, because we are not anticipating a large number of taxpayers. (We are aiming for 100 filers per site). This pilot would provide a needed service for people who are deaf and moderate-income but may still have difficulty obtaining accessible paid tax preparation.
- Those who are self-employed and would require a more complicated Schedule C form could contact Joshua directly and pay for the service.

Can people who are deaf and blind use this service?

Not on their own, but they could if they brought a friend or family member with them to help them.

What are the available times for tax preparation? Is there weekend and evening availability? How many consumers can you serve at the same time?

- Appointments will be available on weekday evenings (4:00 – 9:00 p.m.) and on Saturdays and Sundays (9:00 a.m. – 5:00 p.m.).
- Appointments can be made online, so consumers can reserve a time themselves or solicit assistance from the hosting organization.
- Joshua is checking on how far in advance appointments can be made.
- The number of appointments depends on the number of preparers available that day.

Will the preparers prepare federal, New York State forms and other states' forms? NYC-210 forms for the NYC School Tax Credit?

- The preparers will prepare federal and New York State returns, as well as other states' returns as needed.
- They will also prepare forms for taxpayers who aren't filing full returns but would still be eligible for certain tax credits (i.e. NYC School Tax Credit, Renters' credit, Child and Dependent Care Credit).

Will the preparers backfile?

This shouldn't be a problem, but Joshua is going to confirm this and get back to us.

How long does it take to prepare the average person's return?

30-45 minutes

Who will complete the IRS intake sheet?

The tax preparers at DeafTax.com will complete the full IRS intake sheet, though the sites should collect basic information on the taxpayer to help us compare numbers.

Who would get credit for the returns?

The returns would be submitted from DeafTax.com in Washington, DC, so they would get credit. NYC coalition members would also be recognized for their logistical and outreach work.

Post-Tax Season**What happens to the phones after tax season?**

The phones are on loan and will have to be returned after tax season.

Will we have the opportunity to do this next year and afterwards?

Ideally, we can replicate this next year, based on the outcome of the pilot.

Outreach

Is there a flyer that the pilot cities are using or should we create one?

- The National Disability Institute is creating flyers, which we will co-brand.
- Deaftax.com will develop their website to include the VITA pilot, which we can also use for marketing.
- Sarah will check on accessibility to 311, New York City's information hotline, for the potential listing of pilot sites.

Funding

Who is funding this project and what is the cost?

- DeafTax.com is generously donating \$30,000 in staff time to this pilot.
- DeafTax.com will also use an email campaign and email tracking, and for every new paying customer, they will donate \$25 to the organization that made the referral. Paying customers may include filers who earn more than \$45,000 or who need to file complicated Schedule C forms.
- The National Disability Institute will generously provide a \$3,000 minigrant to the NYC Tax and Benefits Disability Coalition for this project.

How much do the phones cost?

They are expensive, but not for sale.

Other

Is the IRS SPEC contact in Washington D.C. aware of this pilot?

The contact is aware and we will be in touch with to keep them in the loop.



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[Tech Specs](#)

[Image Gallery](#)

Ojo Video Phone Technical Specifications

The latest video technology – easy to set up and easy to use



Ojo PVP-1000 specs

General

DC Input	12 V
DC Current	3 A (typical)
Power Consumption	30 W
AC Power Adapter	100-240 VAC, 60Hz
Operating Temperature	10-40 °C
Storage Temperature	0-70 °C
Dimensions	14"x8.5"x7.5"
Weight	2.5 lbs

Network

Connector	RJ-45
Protocol	TCP/IP
Ethernet Network Interface	100 Base-T
Communication Standards	SIP, TCP/IP, UDP, RTP
Security	SRTP, 128 bit AES
Call Bandwidth	110 - 250 Kbps



Ojo PVP-900 specs

General

DC Input	12 V
DC Current	3 A (typical)
Power Consumption	30 W
AC Power Adapter	100-240 VAC, 60Hz
Operating Temperature	10-40 °C
Storage Temperature	0-70 °C
Dimensions	14"x8.5"x7.5"
Weight	2.5 lbs

Network

Connector	RJ-45
Protocol	TCP/IP
Ethernet Network Interface	100 Base-T
Communication Standards	SIP, TCP/IP, UDP, RTP
Security	SRTP, 128 bit AES
Call Bandwidth	110 - 250 Kbps

PSTN		PSTN	
Connector	RJ-11	Connector	N/A
Pass-Through	Yes	Pass-Through	
Dialing-Mode	Tone (DTMF)	Dialing-Mode	
Audio		Audio	
Compression (Video)	iLBC	Compression (Video)	iLBC
Compression (Audio)	G.711	Compression (Audio)	G.711
Display		Display	
LCD Monitor	7" diagonal	LCD Monitor	7" diagonal
Type	LCD	Type	LCD
Resolution	480 x 854	Resolution	480 x 854
Backlighting	Yes	Backlighting	Yes
Anti-Glare Coating	Yes	Anti-Glare Coating	Yes
Viewing Angle	+/- 30deg(h), +/- 60 deg(v)	Viewing Angle	+/- 30deg(h), +/- 60 deg(v)
Camera		Camera	
Image Sensor	1/4" Color	Image Sensor	1/4" Color
Backlight Compensation	Yes	Backlight Compensation	Yes
Automatic Gain Control	Yes	Automatic Gain Control	Yes
White Balance	Auto	White Balance	Auto
Speakerphone		Speakerphone	
Audio Processing	Full Duplex	Audio Processing	Full Duplex
Echo Cancellation	Adaptive Sub-band	Echo Cancellation	Adaptive Sub-band
Audio Privacy	Yes	Audio Privacy	Yes
Video		Video	
Resolution	176 x 144 (QCIF)	Resolution	176 x 144 (QCIF)
Frame Rate	30 fps	Frame Rate	30 fps
Compression (Primary)	H.264	Compression (Primary)	H.264
Cordless Handset		Cordless Handset	
Dimensions	6.25"x 1.6"x 0.8"	Dimensions	N/A
Weight	5 oz	Weight	
Wireless Interface	2.4 GHz	Wireless Interface	
Range	100 ft	Range	
Display	LCM	Display	
Handset Battery		Handset Battery	
Charge Time	12 hr	Charge Time	N/A
Talk Time	6 hr	Talk Time	
Standby Time	96 hr	Standby Time	
Regulatory		Regulatory	
	CE, CSA FCC Part 15 FCC Part 68 UL Certified		CE, CSA FCC Part 15 FCC Part 68 UL Certified

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