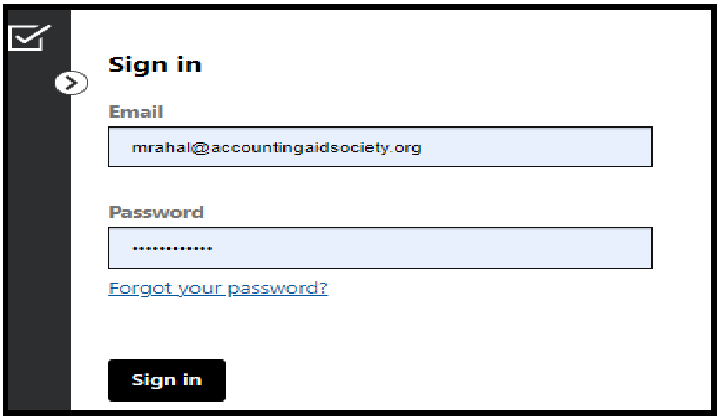
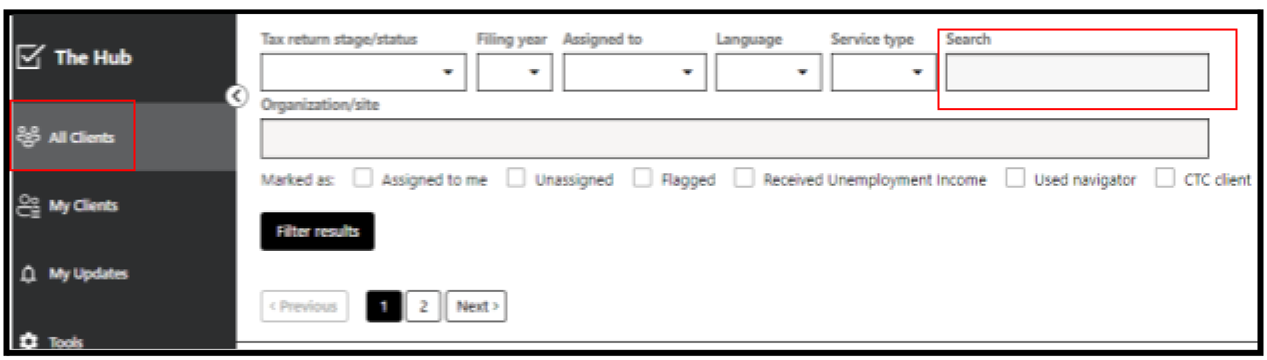
Finalizing return and Calling Clients

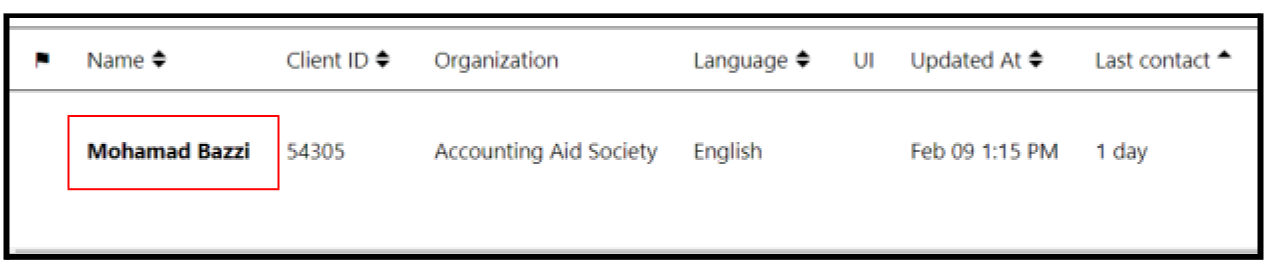
Go to: https://www.getyourrefund.org/en/hub/sign_in and sign in using your email address and password.



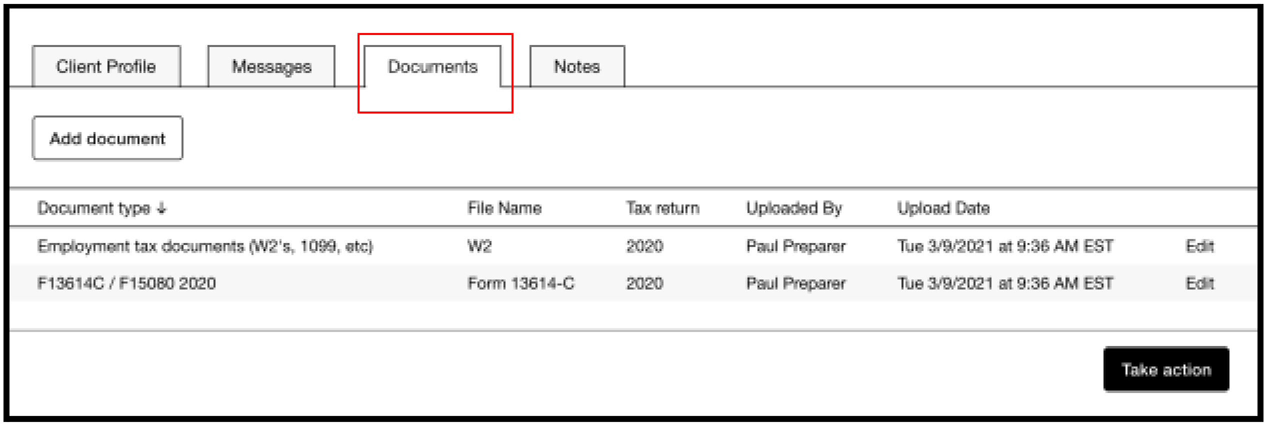
Click on “All Clients”, then search for the client name



Click on the client name

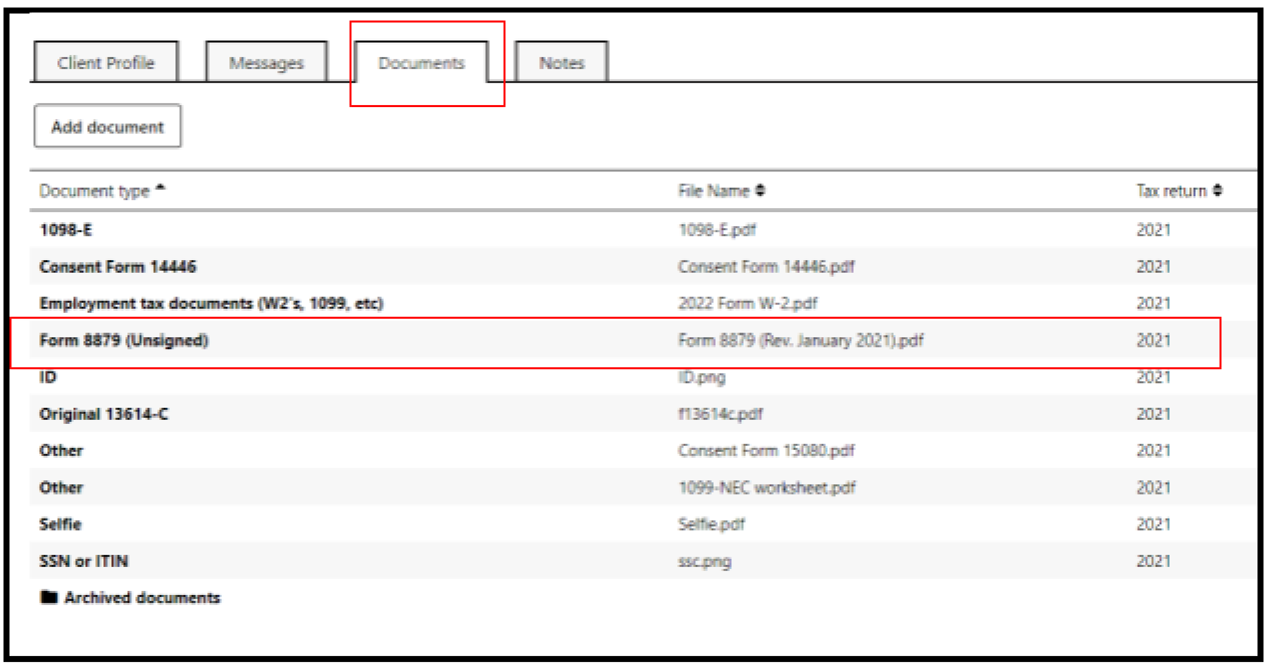


Click on “Document Tab” to access client documents.



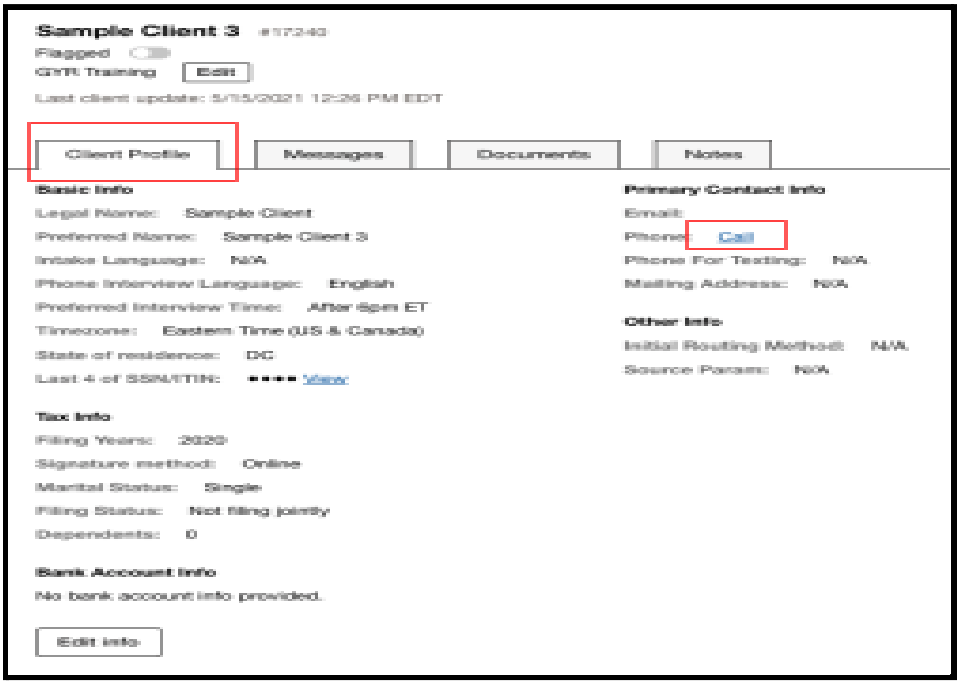
Document type ↓	File Name	Tax return	Uploaded By	Upload Date	
Employment tax documents (W2's, 1099, etc)	W2	2020	Paul Preparer	Tue 3/9/2021 at 9:36 AM EST	Edit
F13614C / F15080 2020	Form 13614-C	2020	Paul Preparer	Tue 3/9/2021 at 9:36 AM EST	Edit

Tax return will be uploaded by AAS staff members to the “document Tab” and renamed “Form 8879 (unsigned).

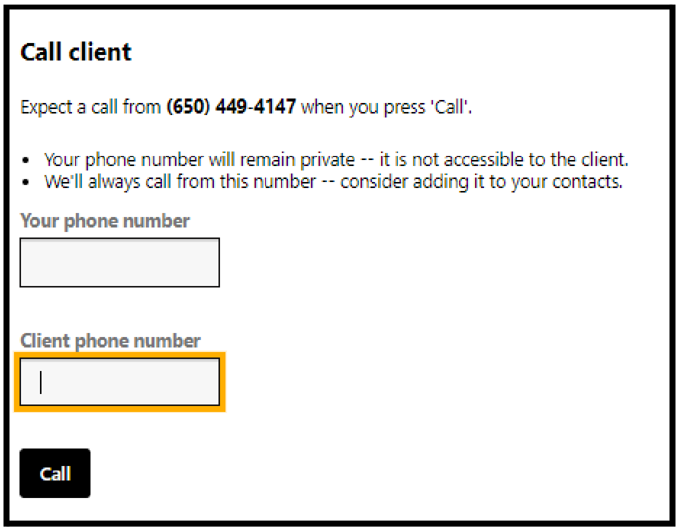


Document type	File Name	Tax return
1098-E	1098-E.pdf	2021
Consent Form 14446	Consent Form 14446.pdf	2021
Employment tax documents (W2's, 1099, etc)	2022 Form W-2.pdf	2021
Form 8879 (Unsigned)	Form 8879 (Rev. January 2021).pdf	2021
ID	ID.png	2021
Original 13614-C	f13614c.pdf	2021
Other	Consent Form 15080.pdf	2021
Other	1099-NEC worksheet.pdf	2021
Selfie	Selfie.pdf	2021
SSN or ITIN	ssc.png	2021

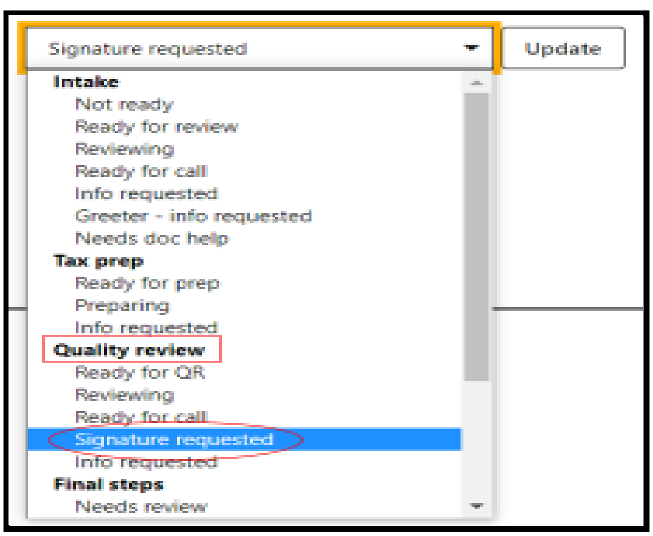
Click the “call” button on the client profile to start a call with the client. You can call clients directly through the Hub.



Enter in your personal phone number. You will then receive a call that'll connect you to the client. With this system, the client won't be able to see your personal cell phone number, but you will be able to use your personal device. The client will get a call from a generic GetYourRefund phone number. You'll want to verify the client's identity by verifying their SSN before discussing any personal information on the call.

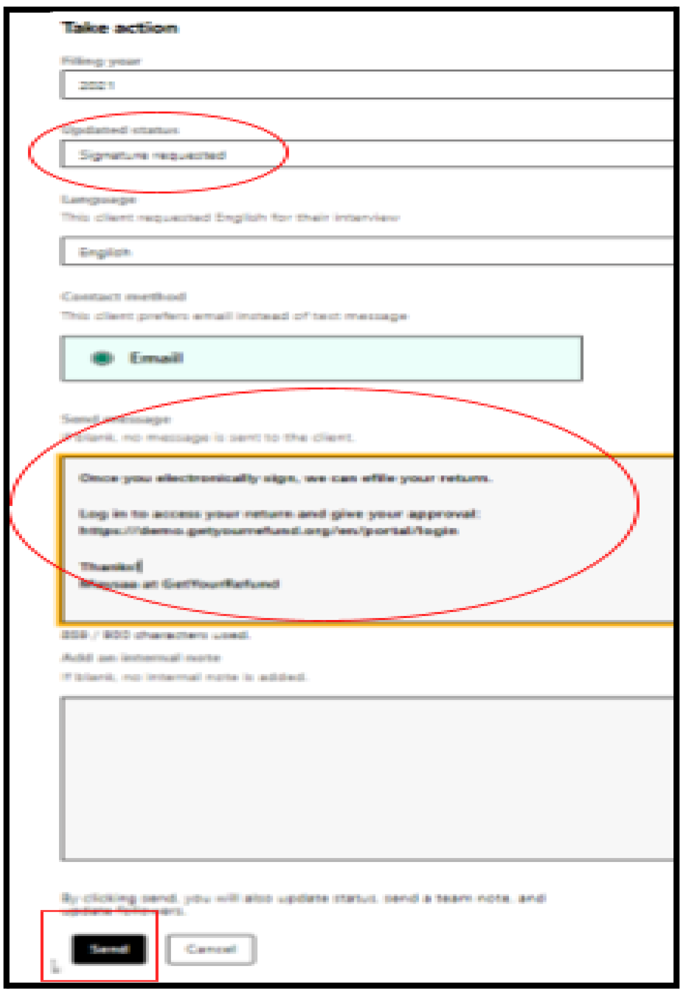


In the Hub change the status to "signature requested" under quality review and select "update" located in the upper right hand corner.



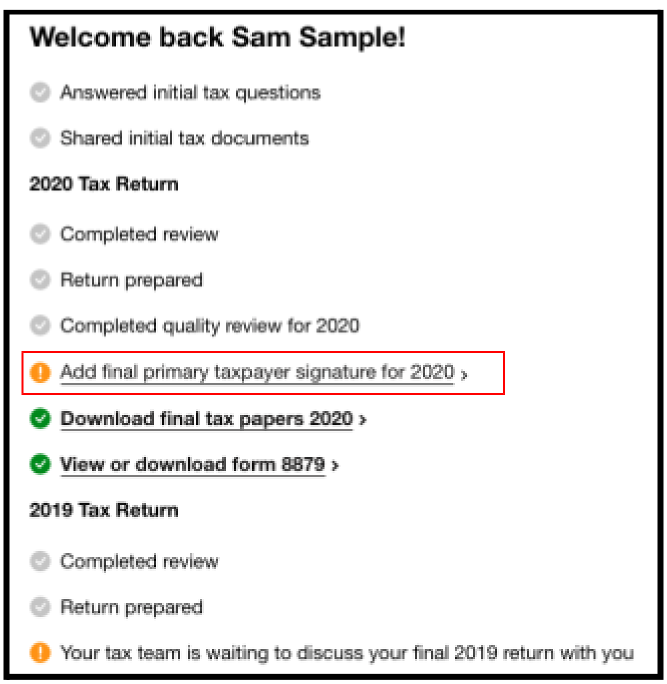
Once you select “Update” you will be directed to the “take action” page and a message with a link will display. Take a look at message, edit it if you have to, and click “send” Here is a template of the message:

Hello!
Your 2021 tax return is ready for you to sign.
Please check:
* your street address and bank account numbers (This can affect your final numbers and/or delay your refund if not correct.)
* any dependent information
* make sure all income is included (including unemployment).
If anything on your return needs to change or if you have any questions, please respond and do not sign your return.
To approve your return, click on the link below, enter the last four digits of your social security number OR your Client ID, review your return, and click a box saying you approve your return.
For jointly filed returns: your spouse also needs to review and sign.
Once you electronically sign, we can efile your return.
Log in to access your return and give your approval:
https://demo.getyourrefund.org/en/portal/login
Thanks!
Maysaa at GetYourRefund



Client should click on the link when they get the message and sign in to their portal

Client will click on “Add final primary taxpayer signature for 2021.” Clients can download their final copy from here too.



The client will check two confirmation boxes. This will send the signed Form 8879 to the Hub and mark the return as “Ready to file.” The site coordinator will now be aware of the tax return being transmitted.

You declare that you have examined a copy of your electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, 2020, and to the best of your knowledge and belief, they are true, correct, and complete.

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, 2020, and to the best of my knowledge and belief, they are true, correct, and complete.

I further declare that the amounts in Part I above are the amounts from my electronic income tax return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund.

If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date.

I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my

- [ ] **I authorize GetYourRefund to enter or generate my PIN as my signature on my tax year 2020 electronically filed income tax return.**
- [ ] **I confirm that I am TEST PRIMARY, listed as the taxpayer on this 2020 tax document.**