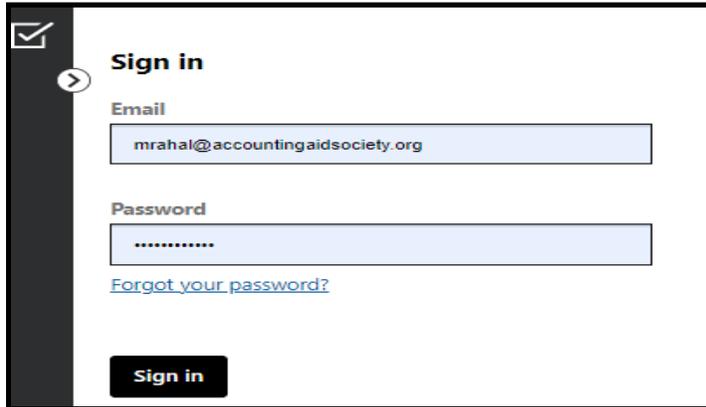


## Finalizing return and Calling Clients

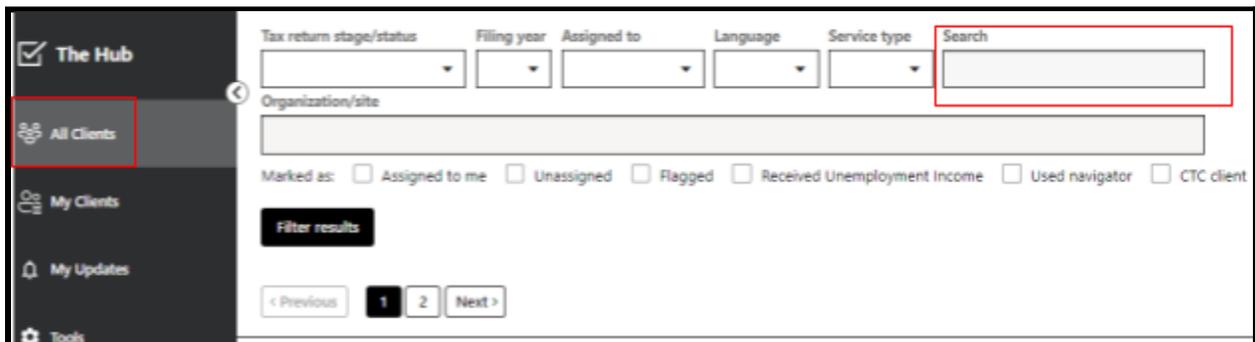
Go to: [https://www.getyourrefund.org/en/hub/sign\\_in](https://www.getyourrefund.org/en/hub/sign_in) and sign in using your email address and password.



The screenshot shows a 'Sign in' form with the following elements:

- A checkmark icon in the top left corner.
- A right-pointing arrow icon next to the 'Sign in' title.
- An 'Email' input field containing the text 'mrahal@accountingaidsociety.org'.
- A 'Password' input field with masked characters '.....'.
- A link for 'Forgot your password?' below the password field.
- A black 'Sign in' button at the bottom.

Click on "All Clients", then search for the client name



The screenshot shows the 'All Clients' page with the following elements:

- A sidebar on the left with 'The Hub' at the top and 'All Clients' selected and highlighted with a red box.
- Other sidebar options: 'My Clients', 'My Updates', and 'Tools'.
- Main content area with filters: 'Tax return stage/status', 'Filing year', 'Assigned to', 'Language', and 'Service type' (all dropdown menus).
- A 'Search' input field highlighted with a red box.
- An 'Organization/site' input field below the filters.
- 'Marked as:' section with checkboxes for 'Assigned to me', 'Unassigned', 'Flagged', 'Received Unemployment Income', 'Used navigator', and 'CTC client'.
- A 'Filter results' button.
- Page navigation: '< Previous', '1', '2', 'Next >'.

Click on the client name



Name	Client ID	Organization	Language	UI	Updated At	Last contact
Mohamad Bazzi	54305	Accounting Aid Society	English		Feb 09 1:15 PM	1 day

Click on "Document Tab" to access client documents.

The screenshot shows a user interface with four tabs: "Client Profile", "Messages", "Documents", and "Notes". The "Documents" tab is highlighted with a red box. Below the tabs is an "Add document" button. A table lists uploaded documents with columns for Document type, File Name, Tax return, Uploaded By, and Upload Date. Two documents are listed: "Employment tax documents (W2's, 1099, etc)" and "F13614C / F15080 2020". A "Take action" button is located at the bottom right.

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)".

The screenshot shows the same user interface as the first image. The "Documents" tab is highlighted with a red box. Below the tabs is an "Add document" button. A table lists uploaded documents with columns for Document type, File Name, and Tax return. The document "Form 8879 (Unsigned)" is highlighted with a red box. Below the table is a section for "Archived documents".

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
<b>Form 8879 (Unsigned)</b>	<b>Form 8879 (Rev. January 2021).pdf</b>	<b>2021</b>
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

■ Archived documents

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

**Sample Client 3** #17242  
Flagged   
GTR Training   
Last client update: 5/15/2021 12:26 PM EDT

**Basic Info**  
Legal Name: Sample Client  
Preferred Name: Sample Client 3  
Intake Language: N/A  
Phone Interview Language: English  
Preferred Interview Time: After 5pm ET  
Timezone: Eastern Time (US & Canada)  
State of residence: DC  
Last 4 of SSN/TIN: \*\*\*\* [View](#)

**Primary Contact Info**  
Email:  
Phone:   
Phone For Texting: N/A  
Mailing Address: N/A

**Other Info**  
Initial Routing Method: N/A  
Source Param: N/A

**Tax Info**  
Filing Years: 2020  
Signature method: Online  
Marital Status: Single  
Filing Status: Not filing jointly  
Dependents: 0

**Bank Account Info**  
No bank account info provided.

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.

### Call client

Expect a call from **(650) 449-4147** when you press 'Call'.

- Your phone number will remain private -- it is not accessible to the client.
- We'll always call from this number -- consider adding it to your contacts.

Your phone number

Client phone number

**Call**

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

Signature requested

**Intake**

- Not ready
- Ready for review
- Reviewing
- Ready for call
- Info requested
- Greeter - info requested
- Needs doc help

**Tax prep**

- Ready for prep
- Preparing
- Info requested

**Quality review**

- Ready for QR
- Reviewing
- Ready for call
- Signature requested**
- Info Requested

**Final steps**

- Needs review

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

**Take action**

Filing year  
2021

Updated status  
Signature requested

Language  
This client requested English for their interview  
English

Contact method  
This client prefers email instead of text message  
Email

Send message  
Blank, no message is sent to the client.

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

255 / 500 characters used.  
Add an internal note  
If blank, no internal note is added.

By clicking send, you will also update status, send a team note, and  
send a message.

Send Cancel

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

## Client Portal

To view your progress, we'll send you a secure code.  
Please enter one form of contact below:

Cell phone number

Email address

[Send code](#)

Authentication needed to continue.  
Protecting your tax information is our priority. To continue, please confirm your identity below.

Client ID or Last 4 of SSN/ITIN

[Continue](#)

To authenticate into the portal, the client will first need to verify their cell phone or email by confirming a 6-digit code. Then, the client will provide the last four digits of their SSN/ITIN number, or provide their client ID.

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CODE AMERICA

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

### Welcome back Sam Sample!

- ✓ Answered initial tax questions
- ✓ Shared initial tax documents

#### 2020 Tax Return

- ✓ Completed review
- ✓ Return prepared
- ✓ Completed quality review for 2020
- 🚨 [Add final primary taxpayer signature for 2020 >](#)
- ✓ [Download final tax papers 2020 >](#)
- ✓ [View or download form 8879 >](#)

#### 2019 Tax Return

- ✓ Completed review
- ✓ Return prepared
- 🚨 Your tax team is waiting to discuss your final 2019 return with you

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.