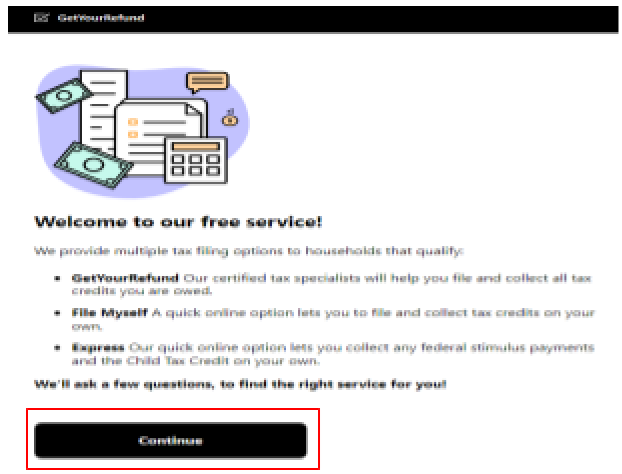
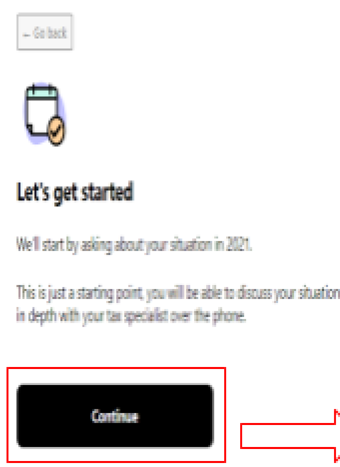
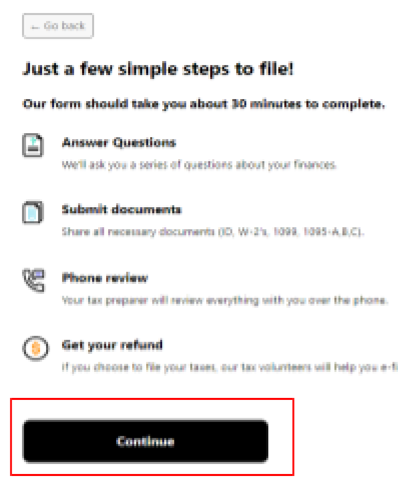
Intake Process Step by Step

Proceed to www.getyourrefund.org/VITAACE and select “Get started”. On the next page select “Continue”

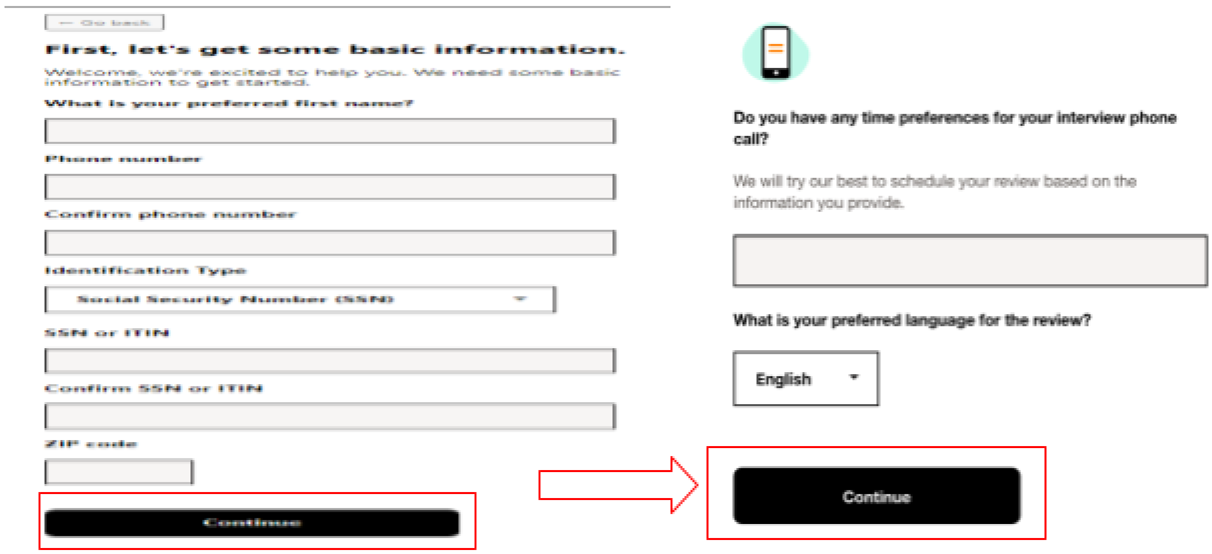


Select which tax year you are filing for. On the next two pages click “continue”.

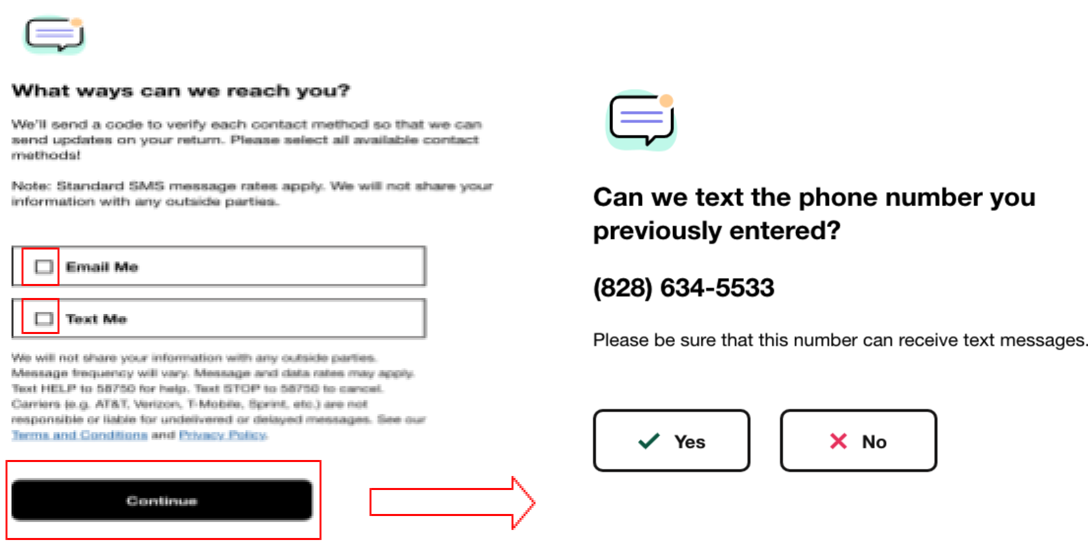




Fill out the basic information section and select 'continue".



Check which method/s of communication the client prefers to be reached. Answer the question on the next page.



The client will receive a verification code, enter it and select “verify”

Let's verify that contact info with a code!

A message with your code has been sent to: **(415) 553-7865**

Enter 6 digit code

Verify

Explain the details of the legal stuff to the client and let them know they are agreeing and signing the legal documents then select “Continue”

Great! Here's the legal stuff...

You understand the information you provide this site (GetYourRefund.org) is sent to a Volunteer Income Tax Assistance (VITA) preparation site in order for an IRS-certified volunteer to review your information, conduct an intake interview on the phone, prepare the tax return, and perform a quality review before filing your taxes.

You agree to the terms of the GetYourRefund privacy policy at www.GetYourRefund.org/privacy

By proceeding, you confirm that the following statements are true and complete to the best of your knowledge.

The Details

This site is using 100% Virtual VITA/TCE Process: This method includes non-face-to-face interactions with the taxpayer and any of the VITA/TCE volunteers during the intake, interview, return preparation, quality review, and signing the tax return. The taxpayer will be explained the full process and is required to consent to step-by-step process used by the site. This includes the virtual procedures to send required documents (social security numbers, Form W-2 and other documents) through a secured file sharing system to a designated volunteer for review.

The GetYourRefund Site Process

Legal first name

Legal last name

Identification Type

Social Security Number (SSN)

SSN or ITIN

Confirm SSN or ITIN

Date of birth

Month | Day | Year

I agree

A few more things...

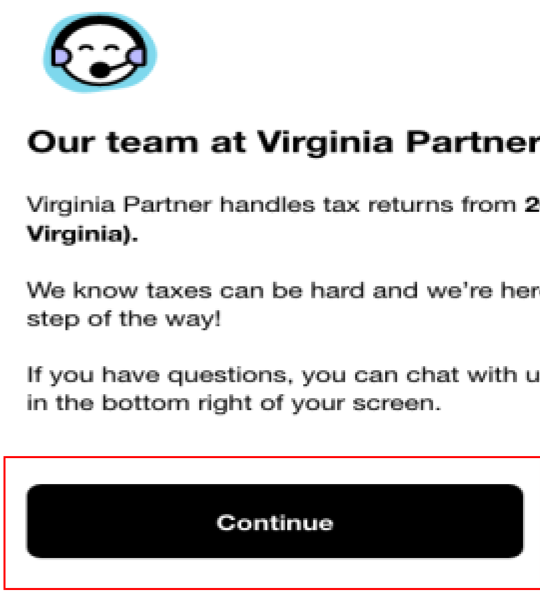
We respect your privacy. **You have the option** to consent to the following:

- [x] Consent to Use: You allow us to count your return in reports.
- [x] Consent to Disclose: You allow us to send tax information to the tax software company and financial institution you specify (if any).
- [x] Relational EFIN: You allow the tax office that prepares your return to report data to their parent organization.
- [x] Global Carryforward: You allow us to make your tax return information available to other VITA programs you may visit.

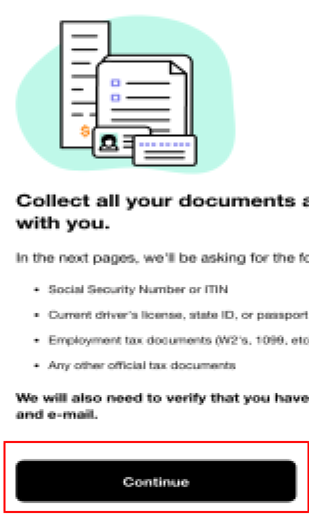
The legal details ›

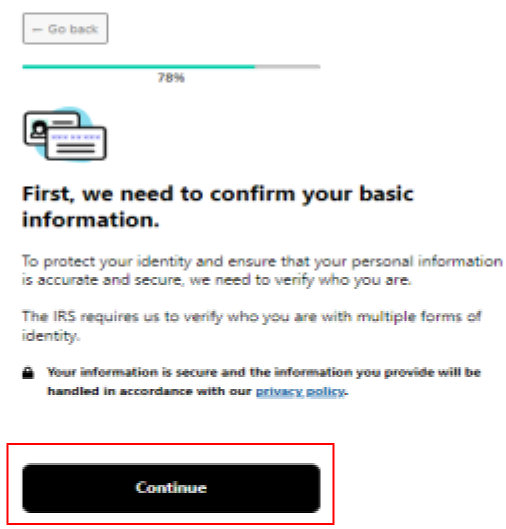
Continue

Make sure this page says "Our team at VitaAce is here to help!" If any other organization shows up, consult with your supervisor.

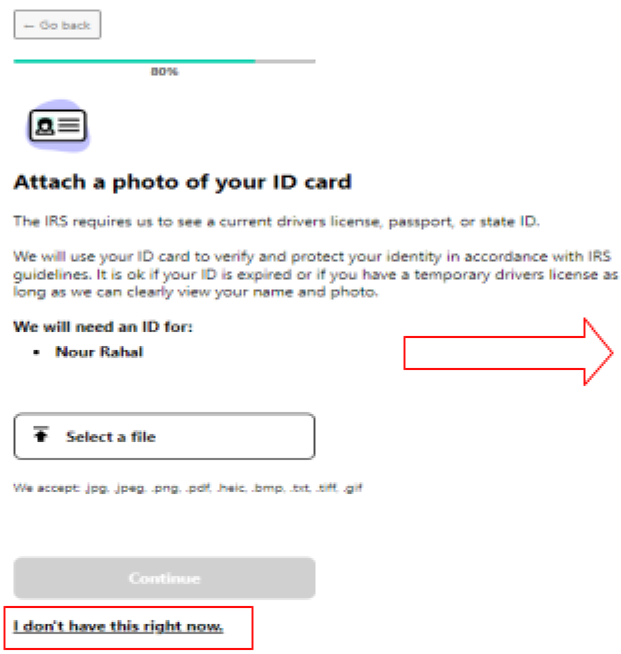


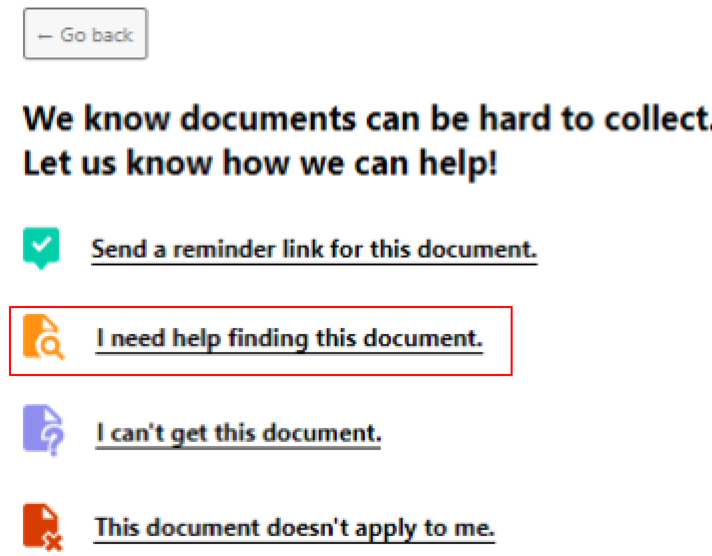
***Now you will be asked all the questions on the federal intake sheet 13614-C. Make sure to answer all of them until you get to the "Collect your document section".



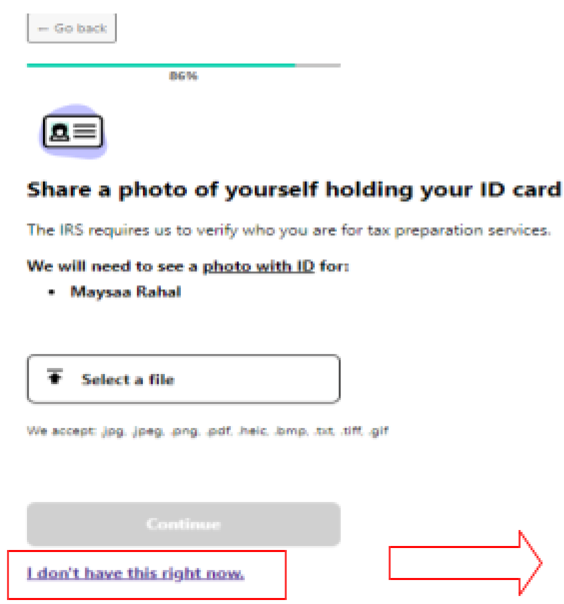


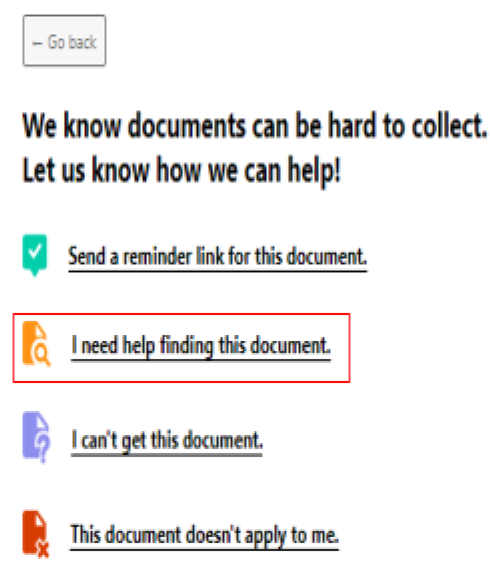
Skip all the document questions by selecting “I don’t have this right now” then choose the option “I need help finding this document”



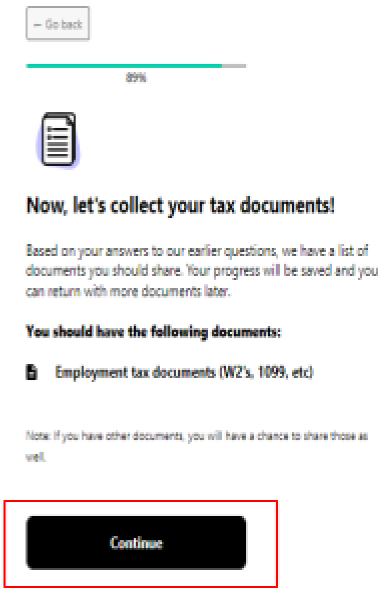


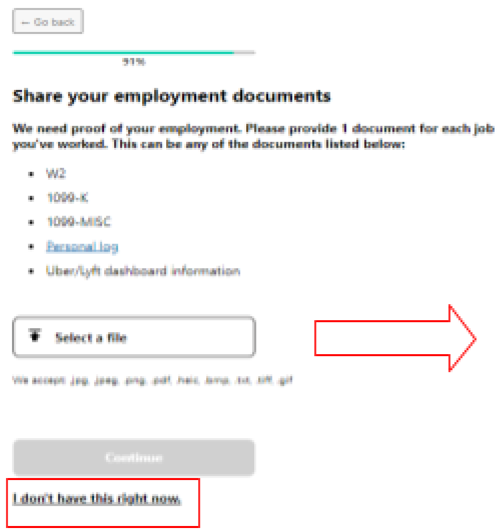
For the photo part select “submit photo” then on the next page select “I don't have it right now”

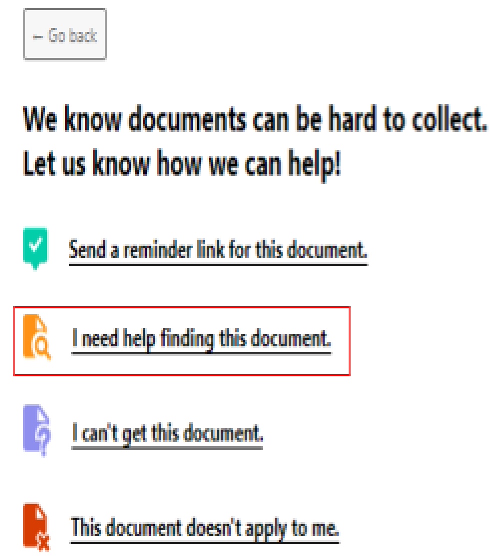




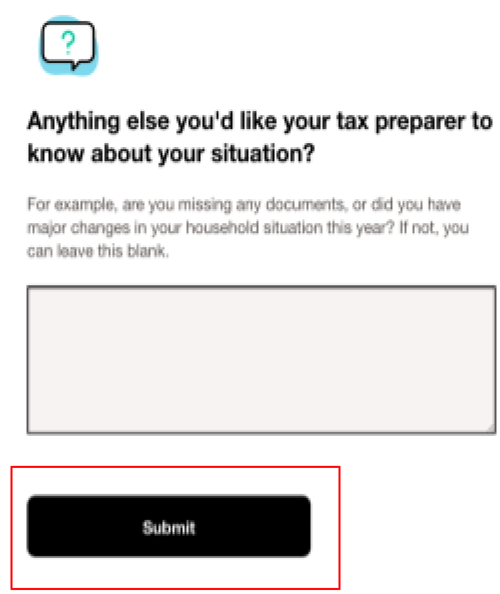
Follow the same steps for all Tax documents. You will gather all these documents after you submit the application.







On the “Great work! Here is a list of what we’ve collected” page, select “I’ve shared all my documents” then select “submit” on the next page.



Make sure to rate your experience and answer the optional questions on the next pages.

Success! Your tax information has been submitted.

Your confirmation number is: 1

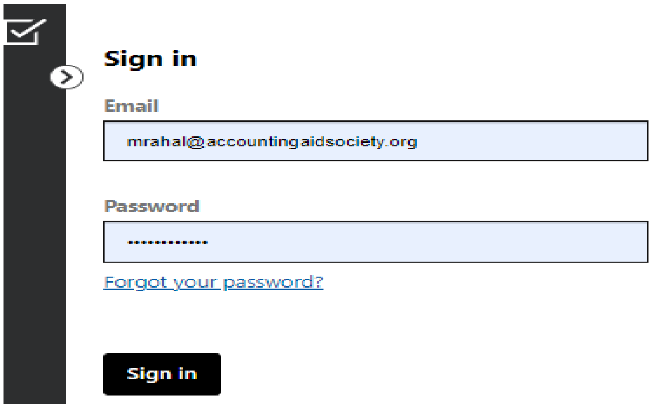
Next Steps

- You will receive a confirmation message shortly
- Your tax preparer at Virginia Partner will review your information
- Virginia Partner will reach out within 3 business days to talk about your taxes

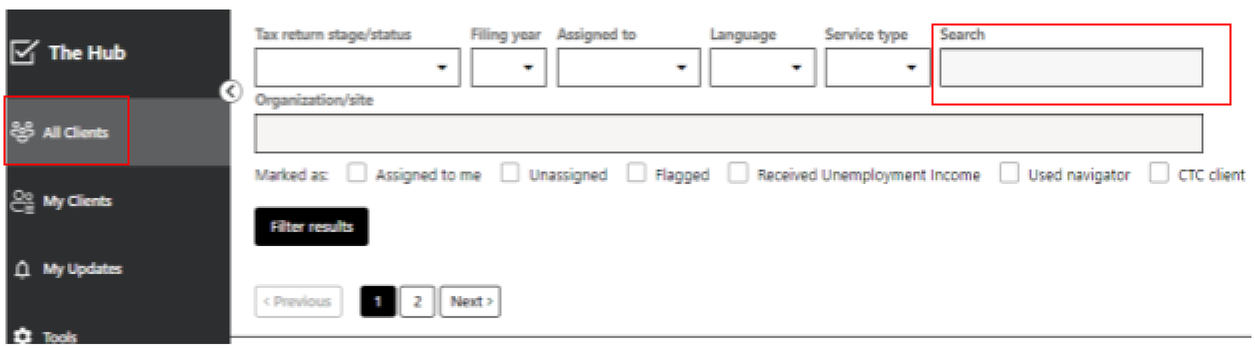
How was your experience with GetYourRefund?

Great! | Ok | Not good

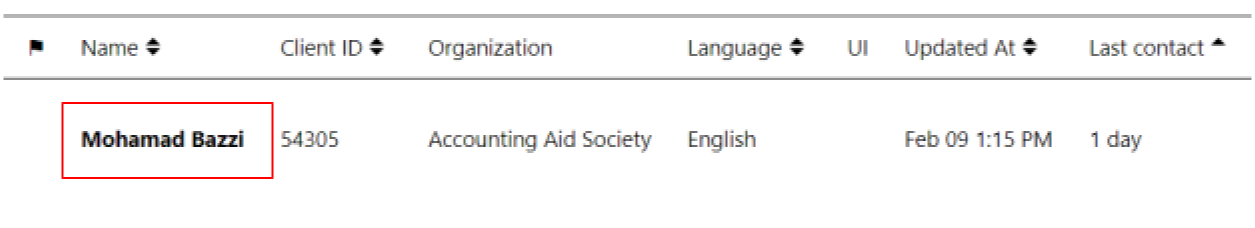
Now Go to: https://www.getyourrefund.org/en/hub/sign_in and sign in using your email address and password.



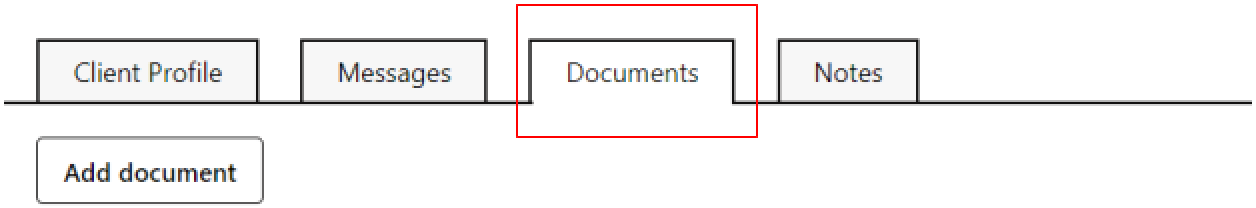
Click on “All Clients”, then search for the client name



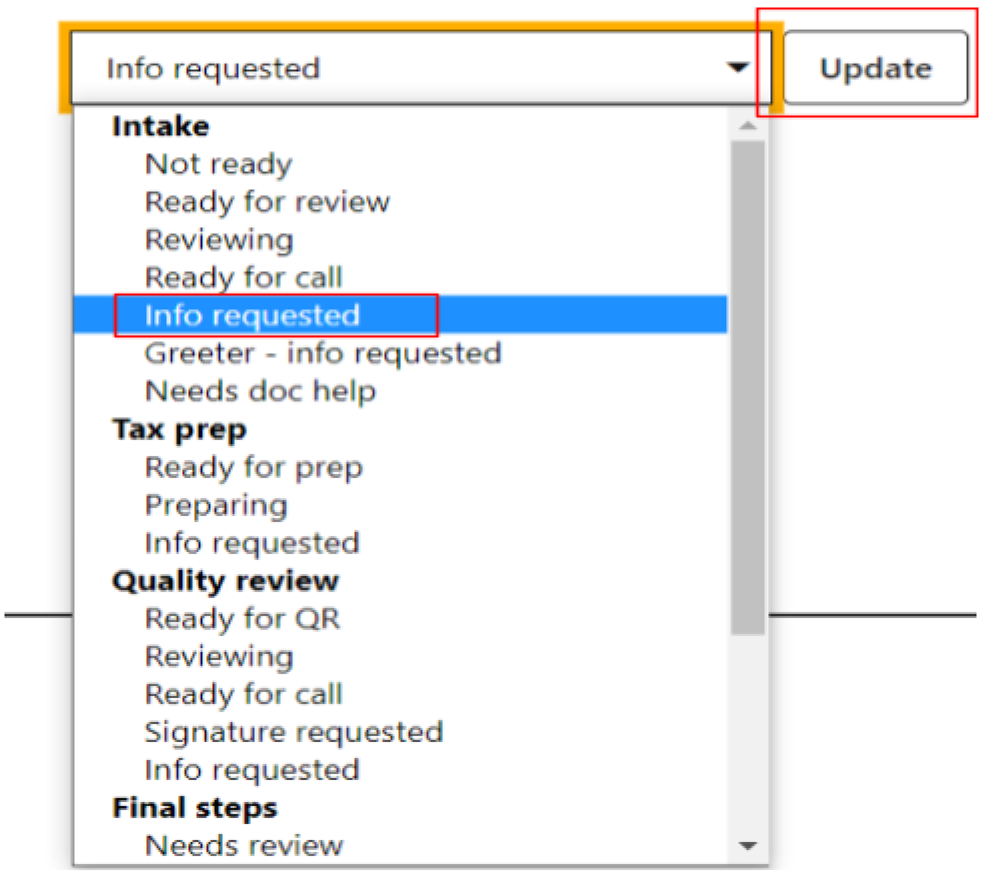
Click on the client name



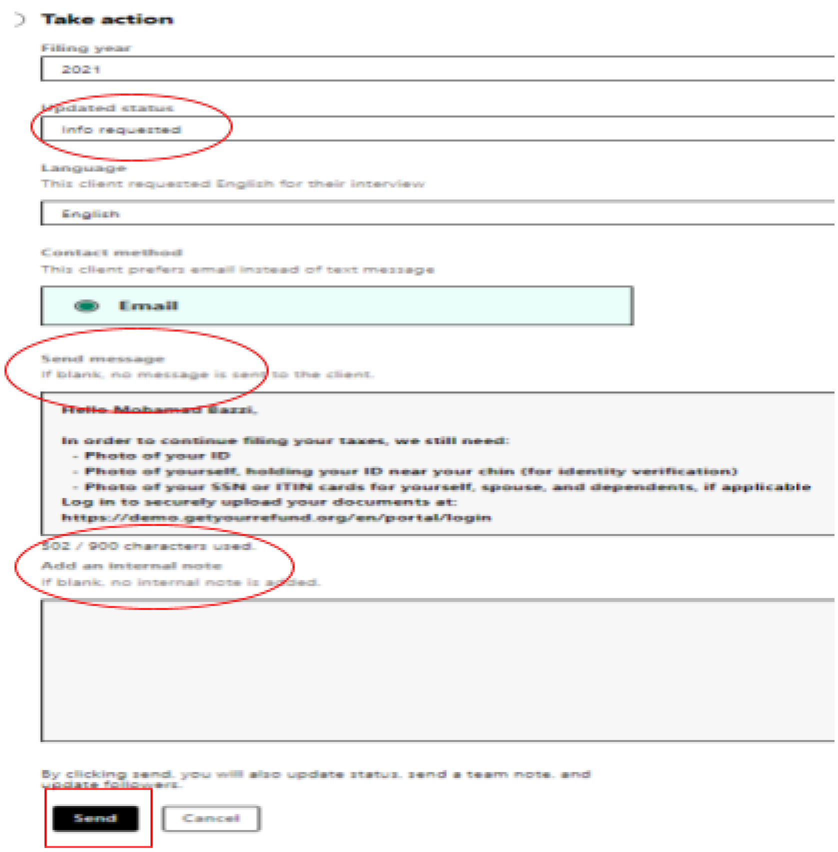
Click on “Document Tab” to access client documents.



In the Hub on the top right corner change the status to “Info requested” under Intake then click “Update”



Once you click update, filing year, updated status, language, contact method, and a generated message will appear. You can add an “internal note” if needed, then click “send” and that will change the status.



The message above states:

Hello “Client name”,

In order to continue filing your taxes, we still need:
- Photo of your ID
- Photo of yourself, holding your ID near your chin (for identity verification)
- Photo of your SSN or ITIN cards for yourself, spouse, and dependents, if applicable

Log in to securely upload your documents at:
https://demo.getyourrefund.org/en/portal/login

Please let us know if you have any questions. We can't begin preparing your taxes without this information.
Thanks,
Your Name at Get your Refund

Make sure to edit this message and ask the client to upload any tax documents needed to file their taxes. For example: upload your W2, 1099-T, SSA 1099 statement, etc.… Then select “send”

Notes

- When you finish the Federal intake process, DO NOT forget to complete with the client Michigan, Federal supplement, and custom questions fillable PDF's and upload them to the HUB.

- 1099-NEC worksheet must be uploaded with any self-employed taxpayer.
  1098-T worksheet must be uploaded with any taxpayer with that form.

****NOTE: Using the unique URL provided on the first page will let you complete the intake process. Make sure to sign out after every client to avoid any confusion mistakes. Failing to sign out after every client may result in overriding the information submitted for the previous client.**