

# Intake Process Step by Step

Proceed to [www.getyourrefund.org/VITAACE](http://www.getyourrefund.org/VITAACE) and select “Get started”. On the next page select “Continue”

GetYourRefund

Thanks for visiting via VITA ACE!

## Free tax filing, made simple.

If you earned income and are ready to file with all of your tax documents, we can help you maximize your tax benefit!

**Get started**

Already started? Sign in

## Welcome to our free service!

We provide multiple tax filing options to households that qualify:

- GetYourRefund** Our certified tax specialists will help you file and collect all tax credits you are owed.
- File Myself** A quick online option lets you to file and collect tax credits on your own.
- Express** Our quick online option lets you collect any federal stimulus payments and the Child Tax Credit on your own.

We'll ask a few questions, to find the right service for you!

**Continue**

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

— Go back

## Which of the following years would you like to file for?

Select all the years you would like to file for:

2018

2019

2020

2021

**Continue**

— Go back

## Let's get started

We'll start by asking about your situation in 2021.

This is just a starting point, you will be able to discuss your situation in depth with your tax specialist over the phone.

**Continue**

— Go back

## Just a few simple steps to file!

Our form should take you about 30 minutes to complete.

- Answer Questions**  
We'll ask you a series of questions about your finances.
- Submit documents**  
Share all necessary documents (ID, W-2's, 1099, 1095-A, B, C).
- Phone review**  
Your tax preparer will review everything with you over the phone.
- Get your refund**  
If you choose to file your taxes, our tax volunteers will help you e-file.

**Continue**

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

[← Go back](#)

### First, let's get some basic information.

Welcome, we're excited to help you. We need some basic information to get started.

**What is your preferred first name?**

**Phone number**

**Confirm phone number**

**Identification Type**

Social Security Number (SSN) ▾

**SSN or ITIN**

**Confirm SSN or ITIN**

**ZIP code**

**Continue**

**Do you have any time preferences for your interview phone call?**

We will try our best to schedule your review based on the information you provide.

**What is your preferred language for the review?**

English ▾

**Continue**

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

**What ways can we reach you?**

We'll send a code to verify each contact method so that we can send updates on your return. Please select all available contact methods!

Note: Standard SMS message rates apply. We will not share your information with any outside parties.

Email Me

Text Me

We will not share your information with any outside parties. Message frequency will vary. Message and data rates may apply. Text HELP to 58750 for help. Text STOP to 58750 to cancel. Carriers (e.g. AT&T, Verizon, T-Mobile, Sprint, etc.) are not responsible or liable for undelivered or delayed messages. See our [Terms and Conditions](#) and [Privacy Policy](#).

**Continue**

**Can we text the phone number you previously entered?**

(828) 634-5533

Please be sure that this number can receive text messages.

Yes  No

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

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](http://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

SSN or ITIN

Confirm SSN or ITIN

Date of birth

### A few more things...

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

**Consent to Use:** You allow us to count your return in reports.

**Consent to Disclose:** You allow us to send tax information to the tax software company and financial institution you specify (if any).

**Relational EFIN:** You allow the tax office that prepares your return to report data to their parent organization.

**Global Carryforward:** You allow us to make your tax return information available to other VITA programs you may visit.

The legal details >

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



## Our team at Virginia Partner is here to help!

Virginia Partner handles tax returns from **20121 (Centreville, Virginia).**

We know taxes can be hard and we’re here to support you every step of the way!

If you have questions, you can chat with us by clicking the button in the bottom right of your screen.



\*\*\*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”.



### Collect all your documents and have them with you.

In the next pages, we’ll be asking for the following:

- Social Security Number or ITIN
- Current driver’s license, state ID, or passport
- Employment tax documents (W2’s, 1099, etc)
- Any other official tax documents

We will also need to verify that you have a valid phone number and e-mail.



← Go back

78%



### First, we need to confirm your basic information.

To protect your identity and ensure that your personal information is accurate and secure, we need to verify who you are.

The IRS requires us to verify who you are with multiple forms of identity.

 Your information is secure and the information you provide will be handled in accordance with our [privacy policy](#).



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

← Go back

80%



### Attach a photo of your ID card

The IRS requires us to see a current drivers license, passport, or state ID.

We will use your ID card to verify and protect your identity in accordance with IRS guidelines. It is ok if your ID is expired or if you have a temporary drivers license as long as we can clearly view your name and photo.

We will need an ID for:

- Nour Rahal



Select a file

We accept: .jpg, .jpeg, .png, .pdf, .heic, .bmp, .tiff, .gif

Continue

**I don't have this right now.**

← Go back

## We know documents can be hard to collect. Let us know how we can help!

- Send a reminder link for this document.
- I need help finding this document.**
-  I can't get this document.
-  This document doesn't apply to me.

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

← Go back

82%

### Confirm your identity with a photo of yourself holding your ID card



The IRS requires us to verify who you are for tax preparation services. We do this by reviewing a photo of you holding your ID card.

★  
Read through the following steps before continuing

- Make sure your face is clearly visible
- Make sure you aren't covering up your ID
- Face the camera directly and include from your shoulders to the top of your head, similar to your ID photo
- Use a plain wall as a background if possible
- If you're wearing glasses in your ID photo, wear them in your selfie photo

**Submit a photo**



**I don't have this right now.**

← Go back

86%



### Share a photo of yourself holding your ID card

The IRS requires us to verify who you are for tax preparation services.

We will need to see a photo with ID for:

- Maysaa Rahal

Select a file

We accept: .jpg, .jpeg, .png, .pdf, .heic, .bmp, .tiff, .gif

Continue

**I don't have this right now.**



← Go back

## We know documents can be hard to collect. Let us know how we can help!

- Send a reminder link for this document.
- I need help finding this document.**
-  I can't get this document.
-  This document doesn't apply to me.

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

89%

Now, let's collect your tax documents!

Based on your answers to our earlier questions, we have a list of documents you should share. Your progress will be saved and you can return with more documents later.

You should have the following documents:

- Employment tax documents (W2s, 1099, etc)

Note: If you have other documents, you will have a chance to share those as well.

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Share your employment documents

We need proof of your employment. Please provide 1 document for each job you've worked. This can be any of the documents listed below:

- W2
- 1099-K
- 1099-MISC
- Personal Log
- Uber/Lyft dashboard information

Select a file

We accept jpg, jpeg, png, pdf, xls, xlsx, csv, txt, ppt, pptx

Continue

I don't have this right now

89%

Go back

We know documents can be hard to collect. Let us know how we can help!

- Send a reminder link for this document.
- I need help finding this document.
- I can't get this document.
- This document doesn't apply to me.

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.

96%

Go back

Great work! Here's a list of what we've collected.

- ID [edit](#)  
Federal Intake Supplement Filable (EVERY RETURN).pdf
- Selfie [edit](#)  
Filable Education Credit Worksheet (1098-T).pdf
- SSN or ITIN [edit](#)  
Michigan Filable Intake (EVERY RETURN).pdf
- Employment [edit](#)  
Intake Site Client Checklist 2022 (drop-off clients).pdf
- Other [edit](#)  
No documents of this type were uploaded.

When you're done sharing the documents you have, we'll schedule an appointment with your tax preparer.

I've shared all my documents

Anything else you'd like your tax preparer to know about your situation?

For example, are you missing any documents, or did you have major changes in your household situation this year? If not, you can leave this blank.

Submit

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?**

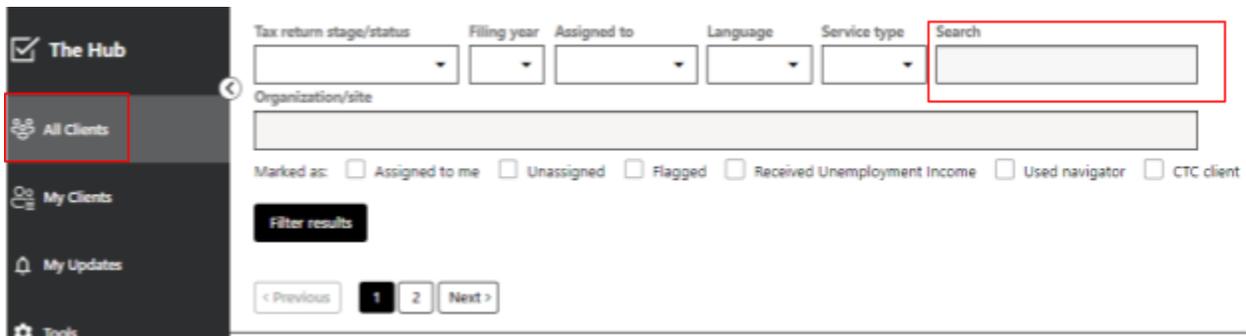


Now Go to: [https://www.getyourrefund.org/en/hub/sign\\_in](https://www.getyourrefund.org/en/hub/sign_in) and sign in using your email address and password.



The image shows a sign-in form with a dark sidebar on the left containing a checkmark icon and a right-pointing arrow. The form has a title "Sign in" and two input fields: "Email" with the text "mrahal@accountingaidsociety.org" and "Password" with a masked password ".....". Below the password field is a link "Forgot your password?". At the bottom is a black "Sign in" button.

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



The image shows a client management interface. On the left is a sidebar with "The Hub" and menu items: "All Clients" (highlighted with a red box), "My Clients", "My Updates", and "Tools". The main area has filters for "Tax return stage/status", "Filing year", "Assigned to", "Language", and "Service type". A "Search" input field is highlighted with a red box. Below the filters is an "Organization/site" search bar. There are checkboxes for "Marked as:" with options: "Assigned to me", "Unassigned", "Flagged", "Received Unemployment Income", "Used navigator", and "CTC client". A "Filter results" button is present. At the bottom are pagination controls: "< Previous", "1", "2", and "Next >".

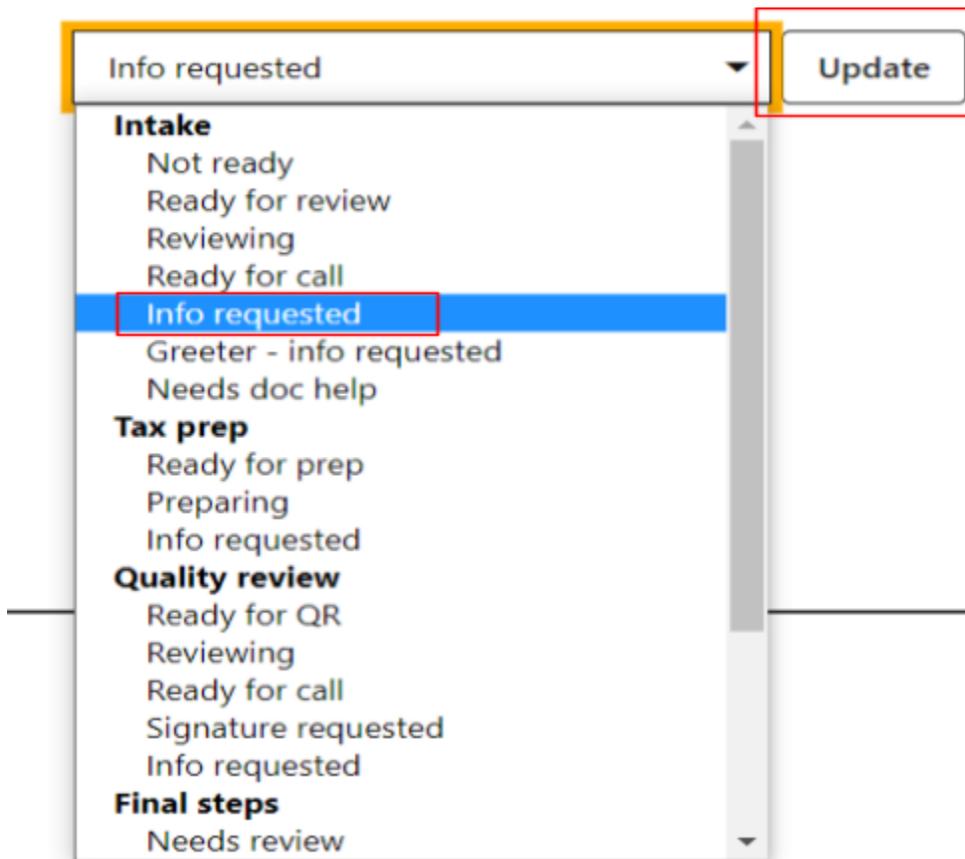
Click on the client name

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.



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.

> **Take action**

Filing year  
2021

Updated status  
Info requested

Language  
This client requested English for their interview  
English

Contact method  
This client prefers email instead of text message  
Email

Send message  
If blank, no message is sent to the client.

Hello Mohamed Bazzi,

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>

502 / 900 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 update followers.

Send Cancel

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.**