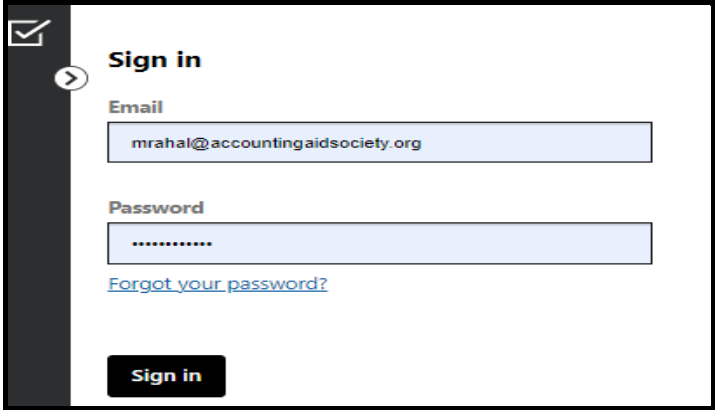


# Quality Review Step by Step

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.



**Sign in**

Email  
mrahal@accountingaidsociety.org

Password  
.....

[Forgot your password?](#)

**Sign in**

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



**The Hub**

Tax return stage/status Filing year Assigned to Language Service type Search

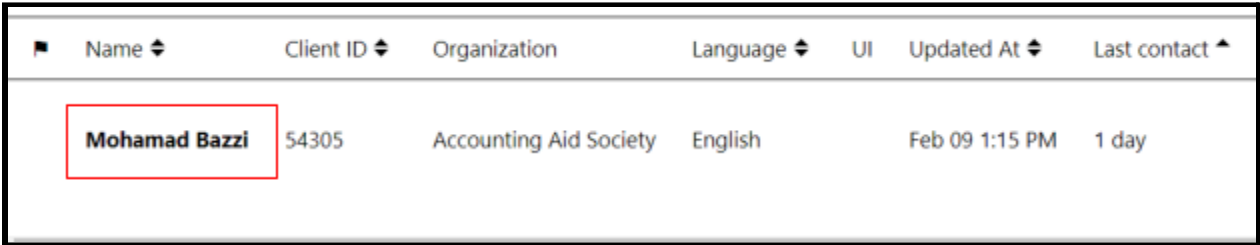
Organization/site

Marked as:  Assigned to me  Unassigned  Flagged  Received Unemployment Income  Used navigator  CTC client

**Filter results**

< Previous 1 2 Next >

Click on the client name



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

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

1. **Client Profile Tab Features:** view basic tax information, edit basic information, View language and name preferences, call the client through the Hub. You can edit the client's information by clicking on "edit info" at the bottom of the page.
2. **Message Tab Features:** send texts / emails to clients, email files to clients, view full client communication history
3. **Document Tab Features:** View client uploaded documents, upload client documents, rename / sort client documents.
4. **Notes Tab Features:** Add internal notes (not visible to client), View volunteer assignment history, View status change history, Tagging other volunteers

In the HUB and change the status to "Reviewing" under Quality reviewer and click "Update" that will change the status

Reviewing

**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

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  
Reviewing

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 Muhammad Basal,**  
Your 2021 return is now being quality reviewed! We'll reach out to schedule a call to review with you soon.  
**Thanks,**  
Mayrae at GetYourRefund

Add an internal note  
If blank, no internal note added.

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

Send Cancel

Go to <https://vita.taxslayerpro.com/ProAvalon/CoreLink/Index?ReturnUrl=%2fproavalon> and login with your username and password. Start the Quality Review process, mark the return “Complete” in taxSlayer once you are done reviewing.

**Log in to Pro Web**

Enter your username and password below to access your cloud-based tax software.

Username

Password

**LOG IN**

[Forgot username](#) | [Forgot password](#)

In the Hub change the status to “Ready for call” under Quality reviewer then click “Update”. That will take you to the Take Action page, and click “Send”.

Ready for call

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**Tax prep**

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**Quality review**

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**Final steps**

- Needs review