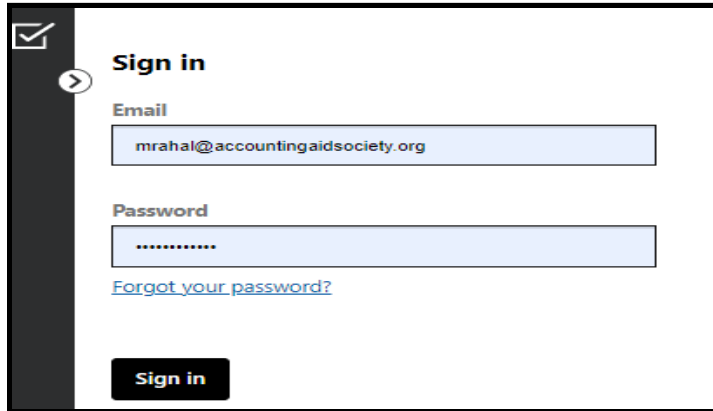


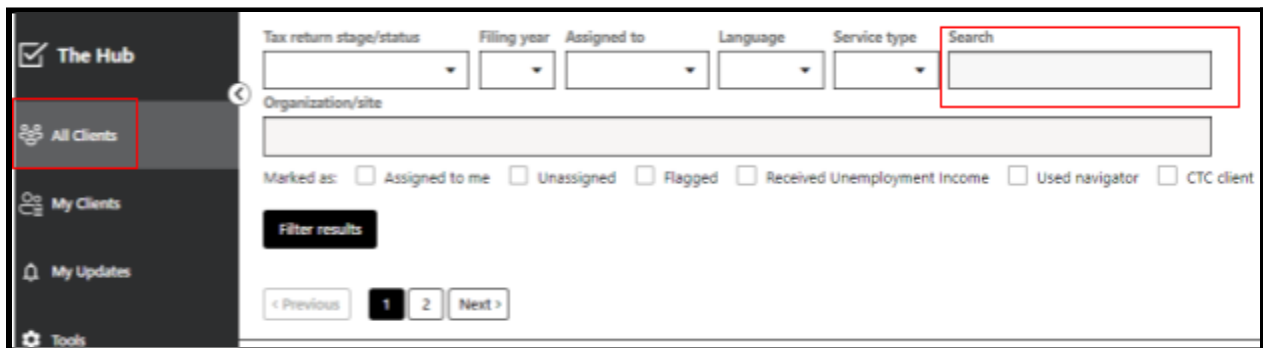
Tax Prep Step by Step

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



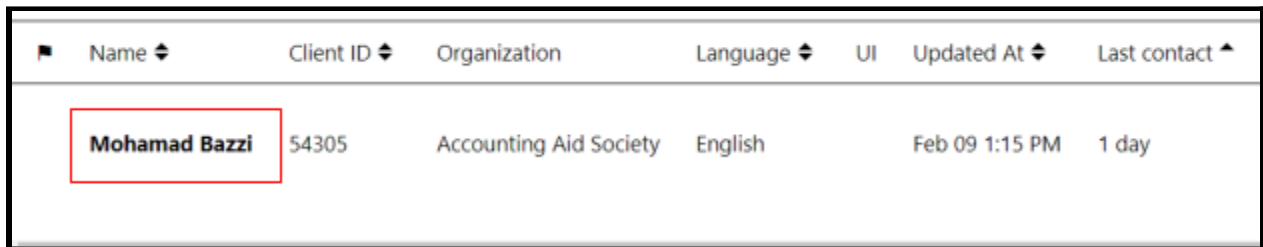
The screenshot shows a 'Sign in' form with a dark sidebar on the left containing a checkmark icon and a right arrow. The form has two input fields: 'Email' with the text 'mrahal@accountingaidsociety.org' and 'Password' with a masked password '.....'. Below the password field is a link for 'Forgot your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

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



The screenshot shows the 'All Clients' page. On the left is a dark sidebar with 'The Hub' at the top and 'All Clients' selected. The main area has a search bar at the top right, highlighted with a red box. Below the search bar are several filter dropdowns: 'Tax return stage/status', 'Filing year', 'Assigned to', 'Language', and 'Service type'. Below these is a large 'Organization/site' search bar. At the bottom, 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 below the checkboxes. At the very bottom, there 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.

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 change the status to "Preparing" under Tax prep then click "Update"

Preparing

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 add an “internal note” if needed, then click “send” and that will change the status.

Take action

Filing year
2021

Preparation status
Preparing

Language
This client requested English for their interview.
English

Contact method
This client prefers email instead of text message.
Email

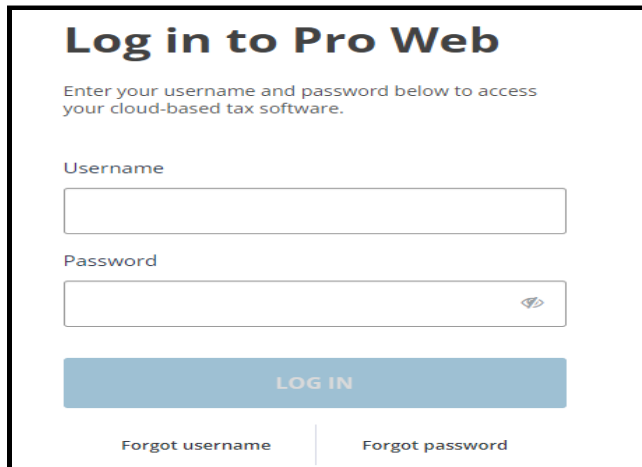
Send message
If blank, no message is sent to the client.
Hello Muhammad Bazzi,
I'm currently preparing your taxes. I'll reach out with any questions.
After your taxes are prepared, I'll pass them to another preparer to review. Then, we'll schedule a call to discuss your return with you.
Thanks,
Mayraa at DeloitteTaxand

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

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

Send Cancel

Go to <https://vita.taxslayerpro.com/ProAvalon/CoreLink/Index?ReturnUrl=%2fproavalon> and login with your username and password and start the preparation process. Mark return Ready for review in taxslayer once you are done preparing the return.



Log in to Pro Web

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

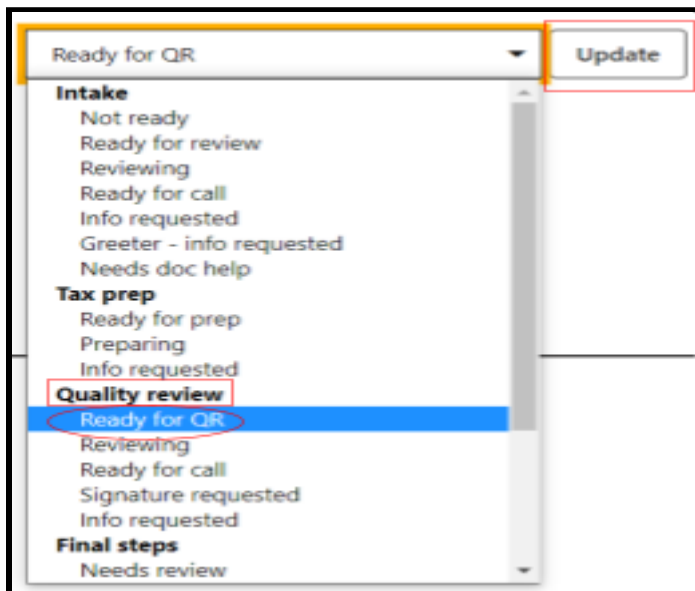
Username

Password

LOG IN

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

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



Ready for QR

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