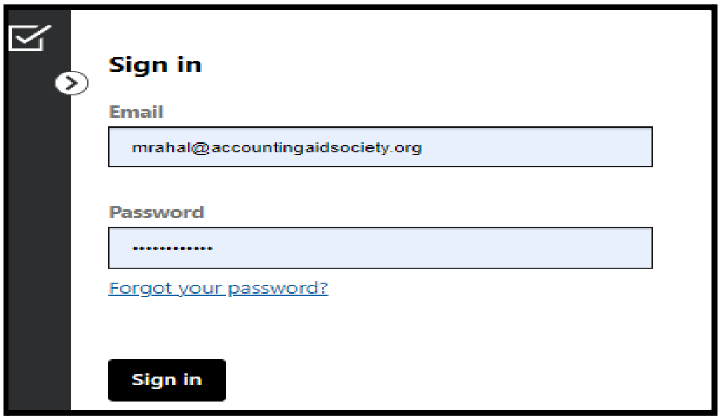
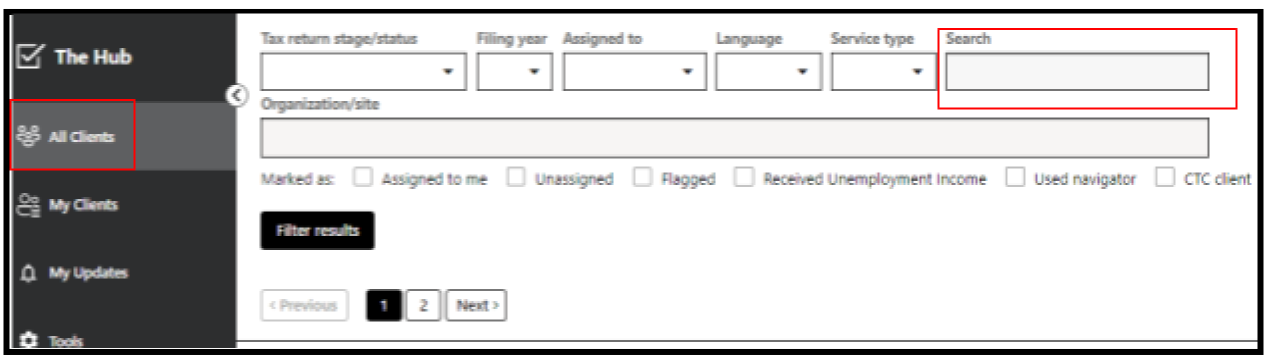
Tax Prep Step by Step

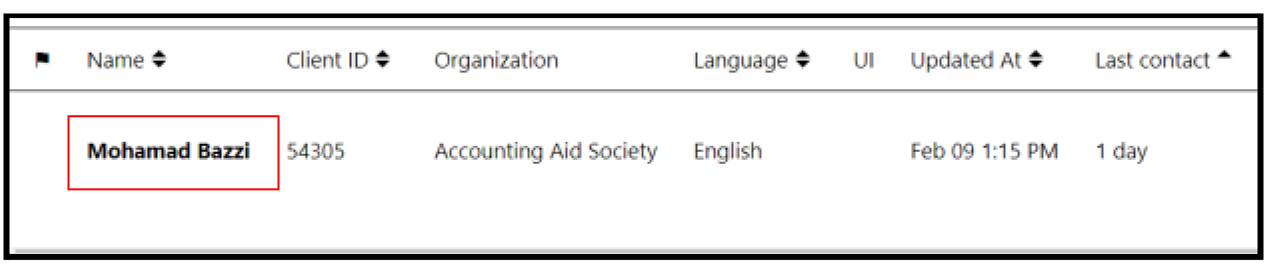
Go to: https://www.getyourrefund.org/en/hub/sign_in and sign in using your email address and password.



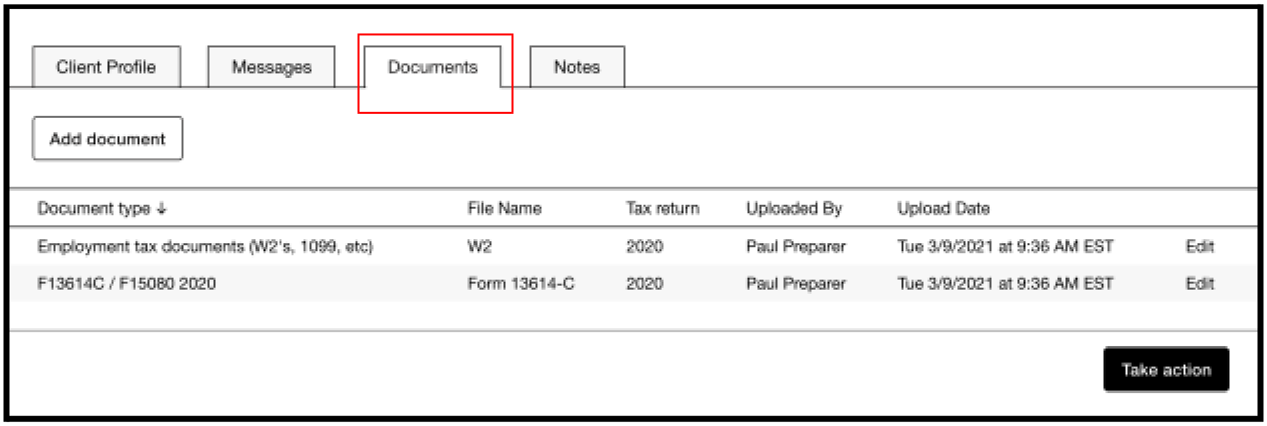
Click on “All Clients”, then search for the client name



Click on the client name

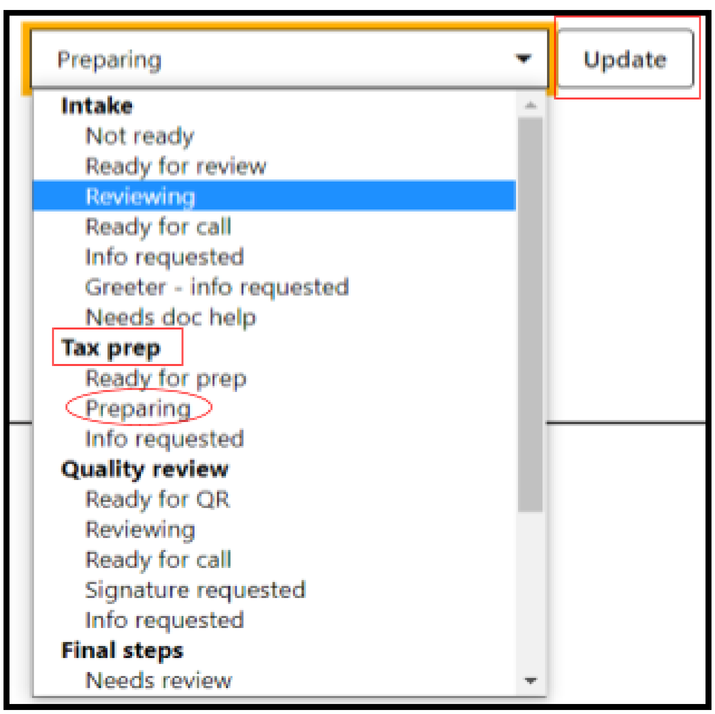


Click on “Document Tab” to access client documents.

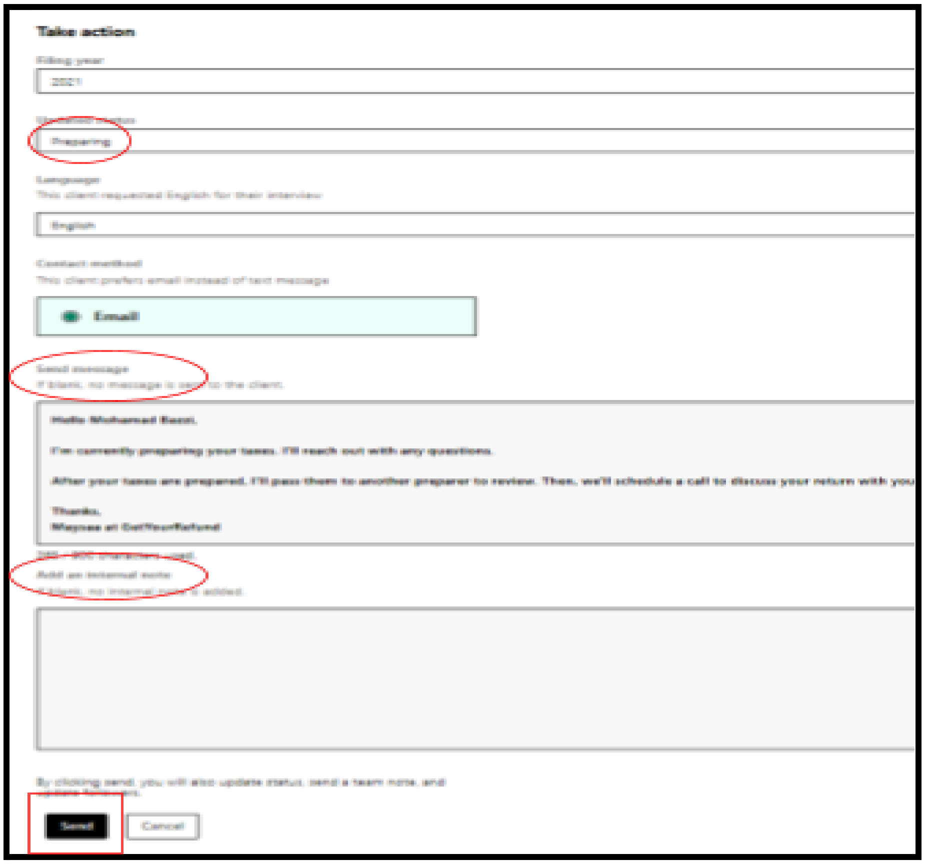


1. **Client Profile Tab Features**: view basic tax information, edit basic information, View language and name preferences**,** call the client through the Hub. You can edit the client’s information by clicking on “edit info” at the bottom of the page.
2. **Message Tab Features:** send texts / emails 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”



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.



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.

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”.