LADDER UP

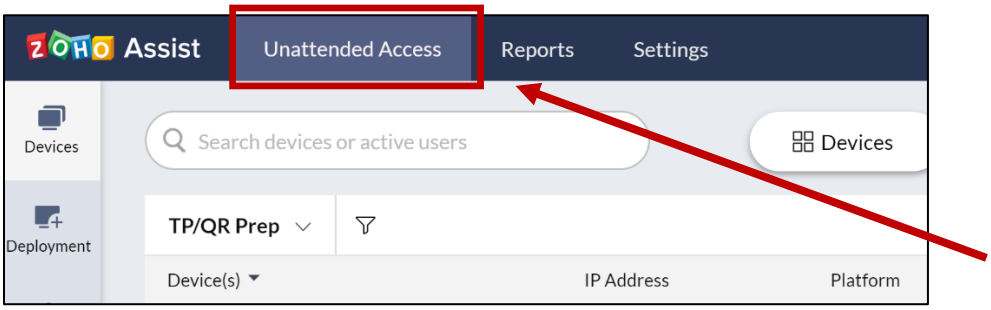
TRAINING – COMPLETNG A PRACTICE TAX REURN FOR VIRTUAL TAP

Please remember that the remote access computers may run a bit slow. Please be patient and only exit your connection through the proper steps. Please NEVER download or print any client documents, or move any client documents off the remote access computers onto your home computer.

Part One: Connect to a Remote Session Using Zoho

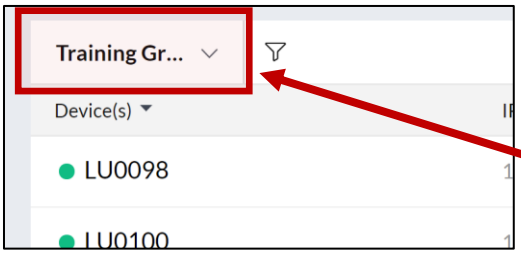
1. Open up a new tab in your browser, and go to: ZOHO ASSIST: https://assist.zoho.com/app/unattended/devices
    - Log in using your username and password for Zoho

2. At top of the page, make sure that "**Unattended Access**" is highlighted:



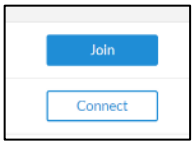
Note: If you see this alert pop up about enabling Wake on LAN, hit the grey "X" box at the far right to dismiss it.

3. Check to make sure that you see "**Training Group**" in the top left.



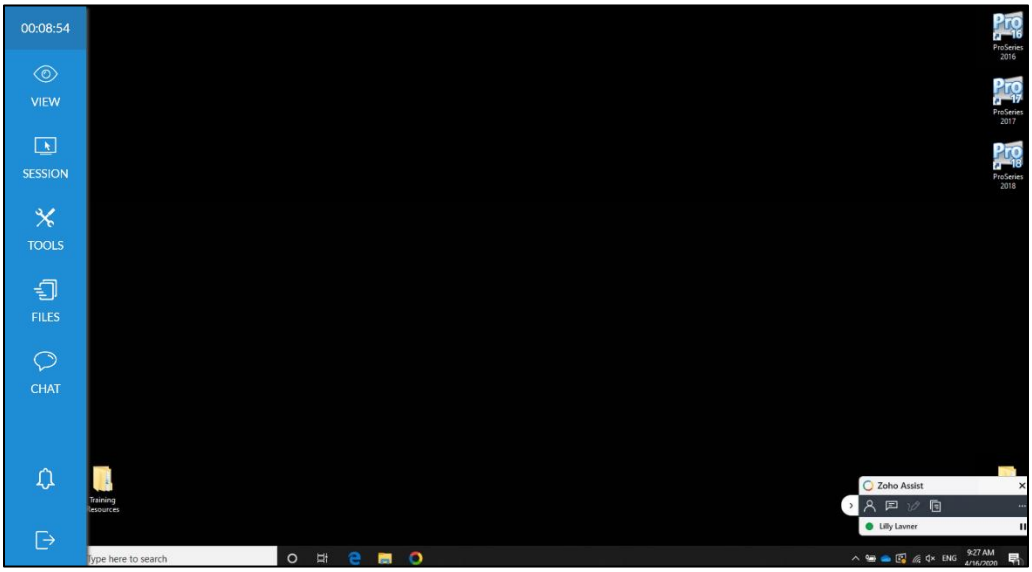
Note: The "Active Users" column heading will always list all computers as *Training*, whether you are accessing the Training Group or the TP/QR Prep Group.

4. Connect to your assigned Zoho computer device by clicking the white "**Connect**" button:

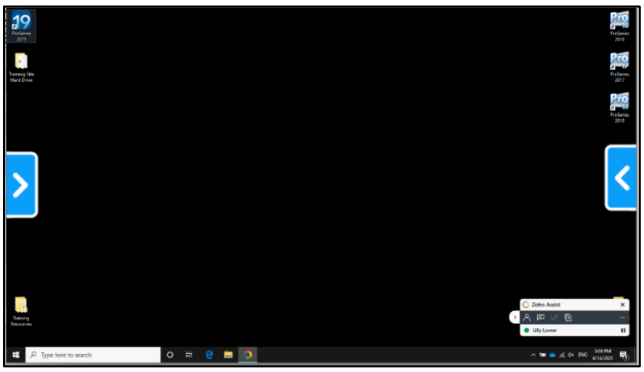


Note: If your assigned computer says "**Join**" instead of Connect, DO NOT CLICK ON IT. You must contact the VE Team (volunteer@goladderup.org) before proceeding.

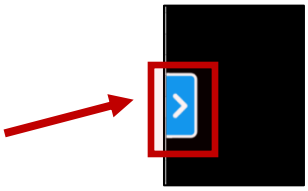
5. After Zoho connects you into one of Ladder Up's virtual computer laptops, you will see what looks like a regular Ladder Up tax site or training computer desktop in your browser tab, with a menu on the left-hand side:



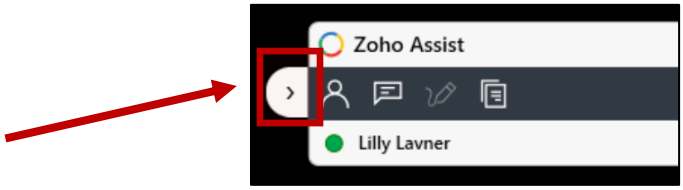
Note: Depending on your browser window size upon log in, your screen may also look like a regular Ladder Up tax site or training computer, with a big blue arrow in the middle of the left and right hand sides of the screen:



6. Click on the blue arrow on the left side of your screen to view the options on the left side-bar Menu:

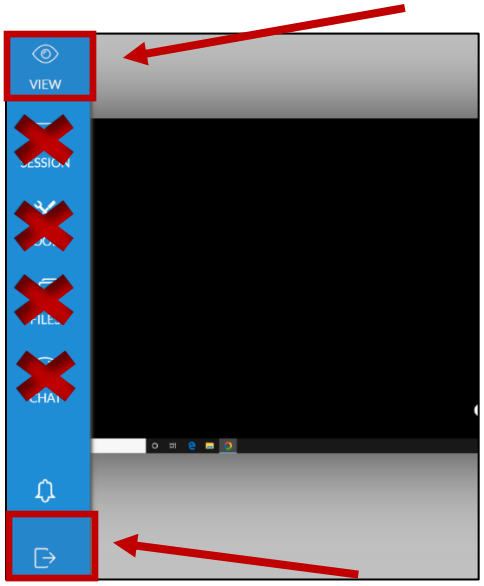


7. If you cannot see the Resources folder at the bottom-right of the desktop when you log in, this is likely because the Zoho Assist tab is covering it.



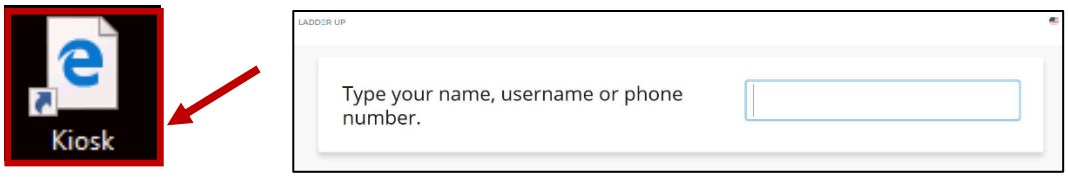
8. To collapse this box, click the small white arrow on the left. Or you can click and drag the Zoho Assist box around to another part of the screen.

9. While using Zoho, please make sure to **only ever use the "View" and the "Exit Menu"** options available on the left side-bar menu.
   Volunteer Tax Preparers and Quality Reviewers should NEVER use any of the middle four features while working with Ladder Up client returns or data:
   - "**Session**"
   - "**Tools**"
   - "**Files**"
   - "**Chat**"

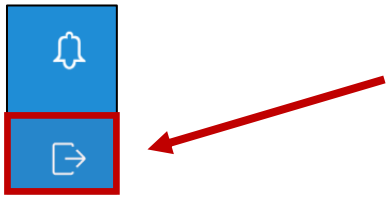


10. Click the top icon option on the left side-bar Menu labeled "**View**" to adjust your settings:
    - 10.1. Actual Size v Full Screen
    - 10.2. Show Remote Cursor
    - 10.3. Color Quality

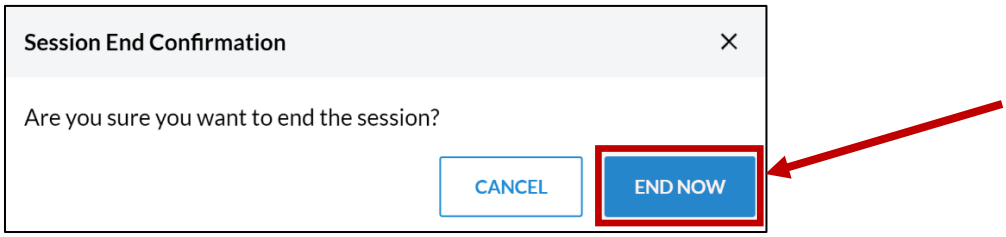
11. Whenever you connect into a Zoho session, make sure you also log into and out of Volunteer Hub by launching the VHub Kiosk on the desktop:



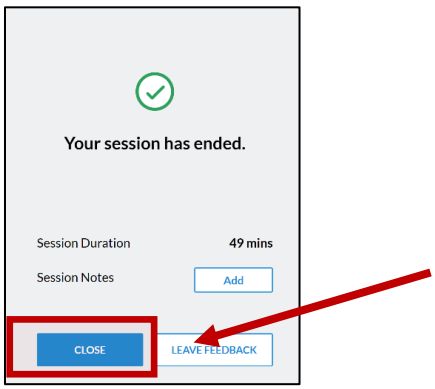
12. To disconnect from a Zoho session, MAKE SURE TO ALWAYS click the bottom left-hand icon option "**Exit Menu**" (Please make sure you always end a remote session using the bottom left-hand exit button.)



13. A box will pop up asking if you are sure you want to exit your session. Click "**End Now**"



14. A box will pop up confirming your session has ended, click "**Close**"

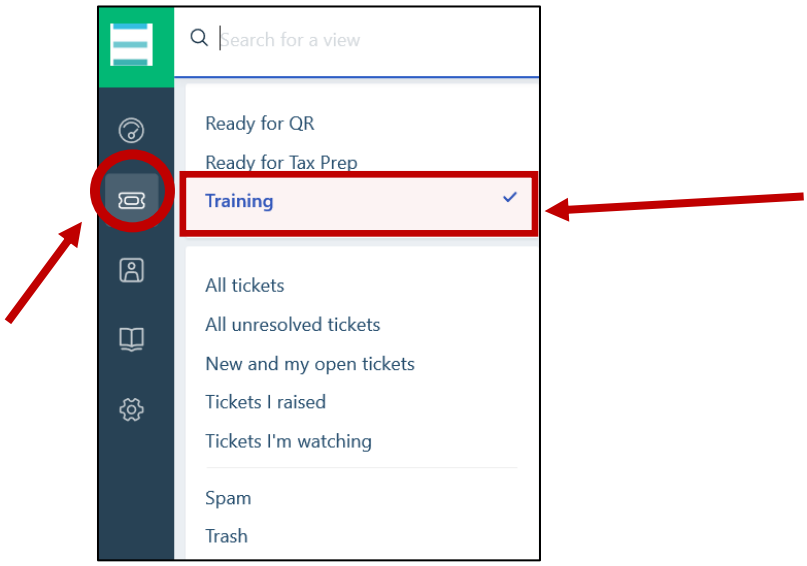


Part Two: Using Fresdesk

15. Open up a second tab in your browser, and go to FRESHDESK: (https://ladderuptap.freshdesk.com/)
    - Log into Freshdesk using your username and password for Freshdesk

16. In Freshdesk, navigate to view your open tickets by using the menu on the left side of your screen. On the left-hand side, click the icon that looks like ticket (sort of). You will click on a customized list called "**Training**" to see your assigned practice tickets.

    Note: In the practice environment, if you would like to practice by completing more than the return assigned to you, you may do so.



17. You can choose a "**Table View"** or "**Card View"** to change your ticket Layout.

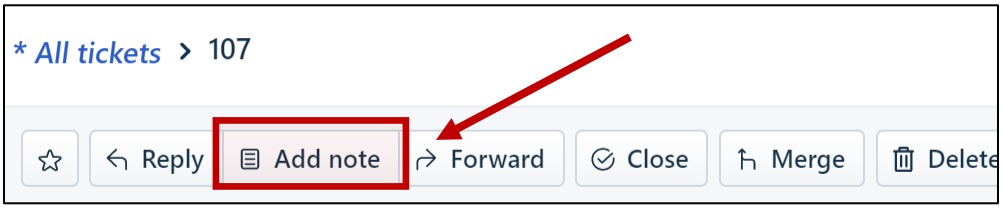
18. To open up a client ticket, click on the subject line of the ticket

5.1 Table View:

5.2 Card View:

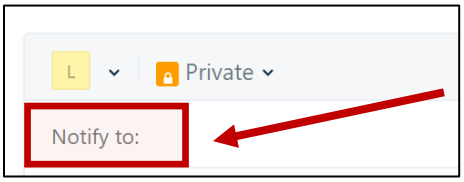
19. Once you open the client ticket, you'll be able to see the client's contact details. In your second browser tab, which is running your Zoho Assist Connection, you will open up the client file that matches your client's contact information.

20. To add a note inside the client ticket, click "**Add note**" from the top menu. This is where you will save only the following information **after you have finished the return**. (All other information and notes will go into the .txt document in the client's file.)
    - Tax Preparer Name
    - Tax Preparer Computer # Used (this is the Computer Device listed in Zoho)
    - ProSeries File name (this will automatically generate, and will be the first four letters of the taxpayer's last name and the last four digits of their Social Security number/ITIN

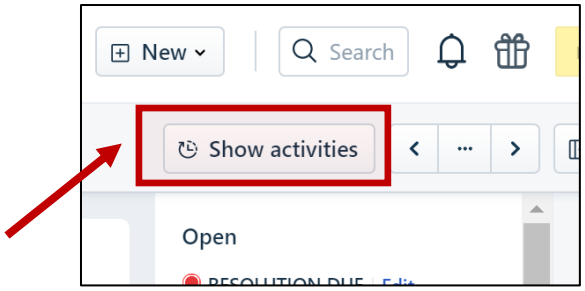


Hint: Make sure that the setting on the note is set to "**Private**" or your note will be sent to the client!

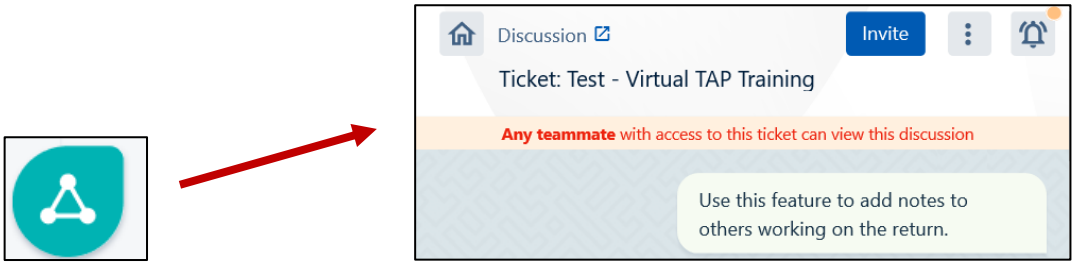
Hint: You can also use the "**Notify to**" feature to share the note with another agent (volunteer or staff) within Freshdesk so that others who are working on the client's file can also view these notes later.



21. If you would like to see additional information on the client's process, and who else has worked on their file, click "**Show Activities**" at the top right of the screen to see more information about the client's process. You can send them a private note within Freshdesk using the "**Notify to**" feature if you have a follow up question before or during your preparation of the tax return.

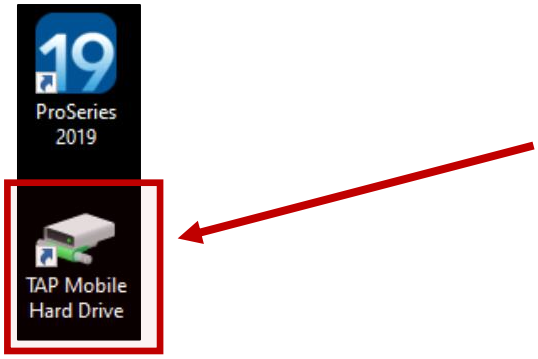


22. To view the Discussion from other agents who have been working on the ticket, you can click on the green triangle-button on the bottom right of the ticket, to expand the discussion section:

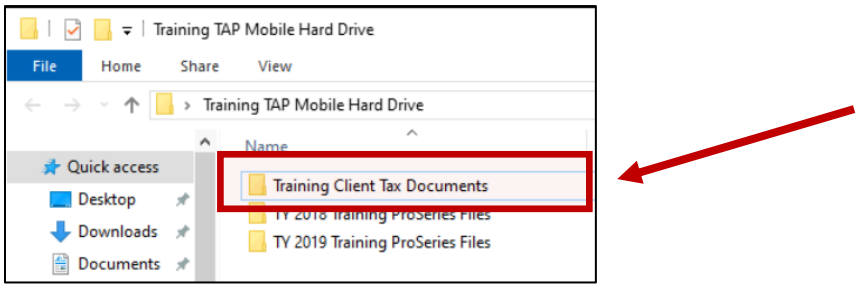


Part Three: Navigating Between Zoho and Freshdesk to Prepare a Return

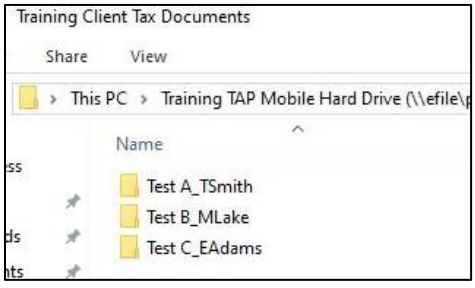
23. In the browser tab running your remote Zoho Assist session, click folder called "**Training TAP Mobile Hard Drive**" on the top left of the desktop, underneath the ProSeries 19 Icon to open it.



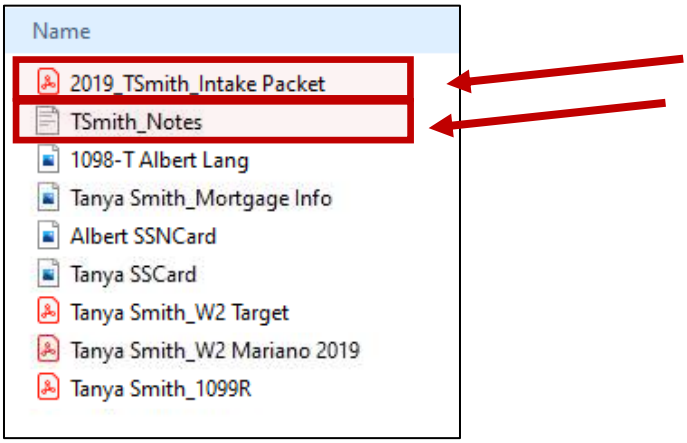
24. Once inside the "**Training TAP Mobile Hard Drive**" folder, open up the folder marked "**Training Client TaxFolders**"



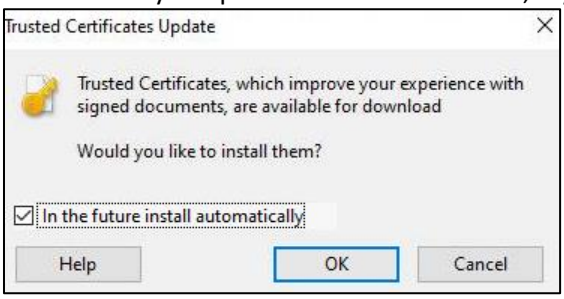
25. Inside the Training Client Tax Documents Folder, there are three clients, labeled **Test A**, **Test, B**, and **Test C**. You will be assigned one of these clients via Freshdesk, and asked to prepare a tax return in ProSeries using one of these folders. (Feel to also prepare additional returns if you have more time and wish to practice some more!)



26. Open up your client's folder, and you will see
    - Client Intake Packet (contains the modified 13614-C, Client Agreement, and IRS Form 14446)
    - All Client Tax Documents and Identification Documents
    - **Client Notes Document (this is where Case Review notes can be found, and where the Tax Preparer and Quality Reviewer should record all additional notes and comments as you prepare the return)**

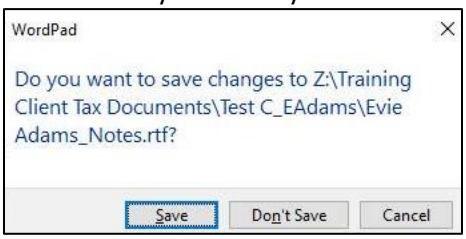


Note: When you open the Intake Document, if you see the following prompt, click "Okay"



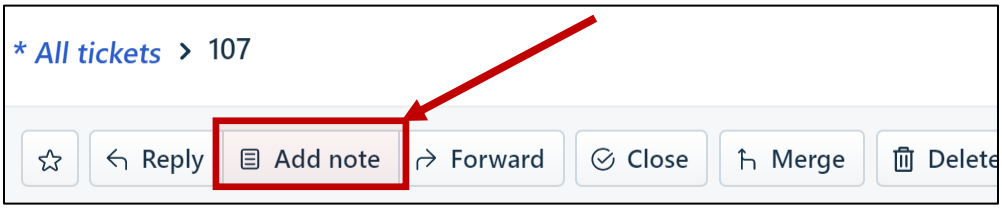
27. Please use the **Virtual TAP Tax Preparer Check List** to review your client's documents and prepare the initial tax return. Use the Client Notes Text document in their file to add your notes.

    Reminder: If you add any notes to the Client Notes file, make sure to click **Save**!



28. After you have finished preparing the tax return, please return to your Freshdesk tab.

29. Open up the ticket for the client you have just completed and click on "**Add note**"



Enter only the following information into the note:

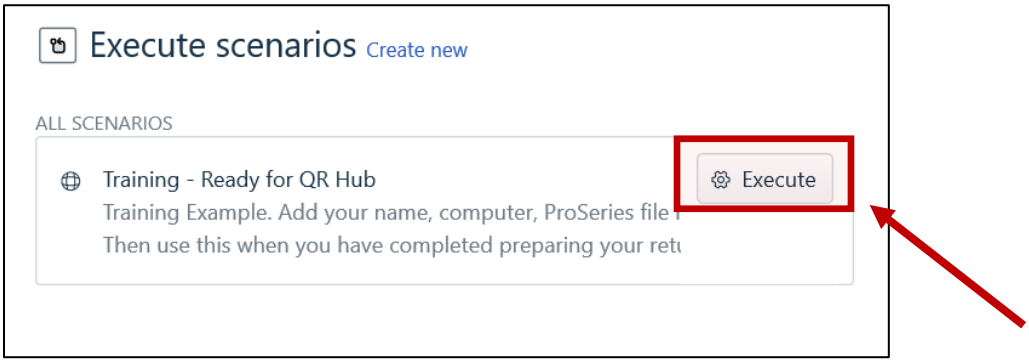
- Tax Preparer Name
- Tax Preparer Computer # Used (this is the Computer Device listed in Zoho)
- ProSeries File name (this will automatically generate, and will be the first four letters of the taxpayer's last name and the last four digits of their Social Security number/ITIN

30. Click "**Add note**" at the bottom right of the ticket to make sure this information is saved into the client ticket.

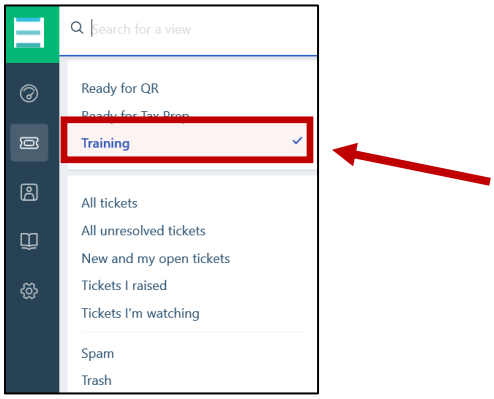
31. While the client ticket is still open in Freshdesk, navigate to top of the client's ticket page, and click on the three vertical dots to the right of the Delete Button to show more. Update the ticket by clicking on "**Execute Scenarios**" to open up a list of options on the right-hand side of the screen.

IMPORTANT REMINDER: PLEASE ONLY EVER UPDATE YOUR CLIENT TICKET'S STATUS BY USING EXECUTE SCENARIO.

32. From the right-hand list of Execute Scenario options, select **"Training - Ready for QR Hub**" from the menu, and click "**Execute**." (When you are preparing a real client, you will see some different execute scenario options to use.)



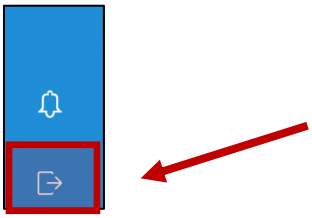
33. If you had been assigned additional returns to prepare, you would then return to Freshdesk, to view the next client ticket by clicking "**Training**" in the top left corner of the screen.



34. When you have finished preparing the practice return(s), please make sure to clean up your Zoho desktop by closing out of any documents of files you opened during your session.

35. Log out of your session in Volunteer Hub by launching the VHub Kiosk on the Zoho desktop and signing out at the end of your session:

36. Click the bottom icon option "**Exit Menu**" to end the remote Zoho Assist session. (Please make sure you always end a remote session using the bottom left-hand exit button.)



Reminders:

- Please make sure to always update the client ticket status in Freshdesk by using "Execute Scenario."
- Please never download or print any client documents, or move any client documents off the remote access computers onto your home computer.
- If you have any questions please contact the Volunteer Engagement Team by e-mailing volunteer@goladdeurp.org, or by calling 312-409-1555, ext. 6.

Troubleshooting:

Missing Information:

In a real tax prep environment, if there are some answers to questions that you do not have in the client notes, or things you would like the QR caller to confirm before finalizing the return, please add them to bottom of the "Notes.txt" document (client notes file) and save the changes. This will ensure that the QR Caller asks the client these questions and makes any necessary changes in ProSeries before finalizing the return.

If a client is missing too much critical information, and you cannot finish the return without it, please complete as much of the return that you can and then make note of what is missing "Notes.txt" document (client notes file). Then **Execute Scenario:** "**Client Follow Up Required**" which will flag the return to your Virtual Site Coordinator.

The Virtual Site Coordinator will review the return and determine what follow up steps need to take place with the client before the return can be moved forward in the process.

Out-of-Scope:

In a real tax prep environment, if you discover that the client is Out-of-Scope, please **Execute Scenario: "Out of Scope."** This will flag the return to your Virtual Site Coordinator.

The Virtual Site Coordinator will review the return and follow up with the client to let them know their return is Out-of-Scope for the program.