

# LADDER UP

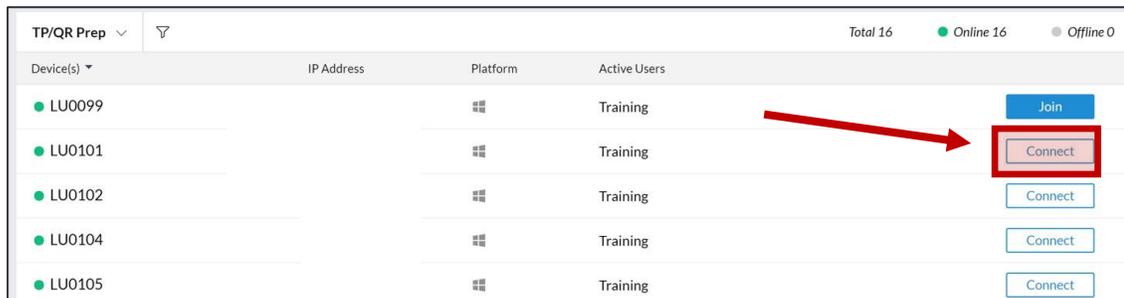
## USING FRESHDESK AS A TAX PREPARER

Thank you for volunteering with Ladder Up! 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.

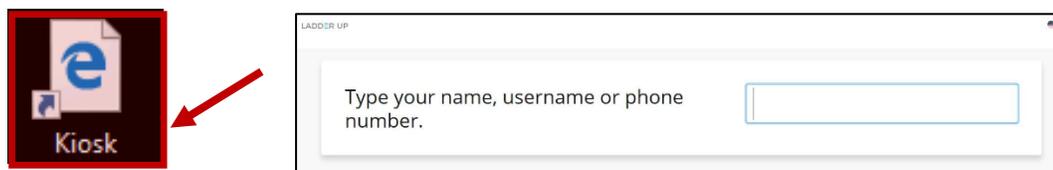
1. Open two tabs in Chrome:

- In one tab, open up **Freshdesk** and log in using your username and password (<https://ladderuptap.freshdesk.com/>)
- In the other tab, open up **Zoho Assist** (<https://assist.zoho.com/app/unattended/devices>) and log in using your username and password. Connect into an **Unattended Access** remote session by clicking the white “**Connect**” button associated with your designated computer device.

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



2. In the Chrome tab running your remote [Zoho Assist](#) session, make sure you log into Volunteer Hub by launching the VHub Kiosk on the desktop and signing in at the start of your session:

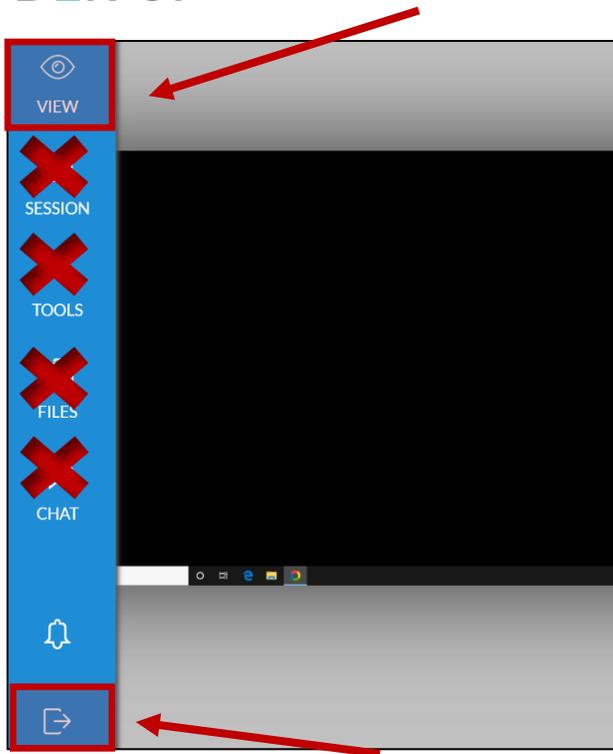


**Reminder:** While using Zoho, please make sure to **only ever use the “View” and the “Exit Menu”** options available on the left side-bar menu.

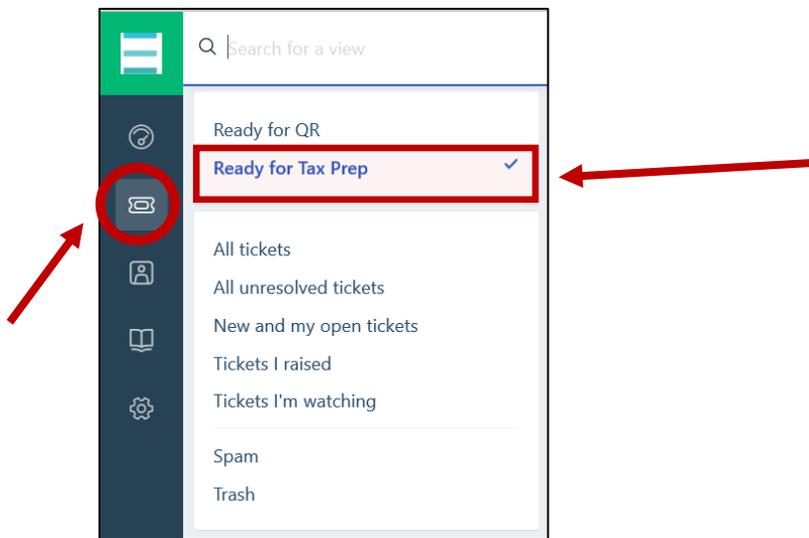
Volunteer Tax Preparers and Quality Reviewers should NEVER use any of the middle four features while working with Ladder Up client returns or data:

- “Session”
- “Tools”
- “Files”
- “Chat”

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3. 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). If you are a Tax Preparer, click on the customized view called **“Ready for Tax Prep”** to see your assigned tickets with this status.



4. You can choose a **“Table View”** or **“Card View”** to change your ticket Layout.

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

## 5.1 Table View:

Contact	Subject	State	Group
<input type="checkbox"/> A Alexandravizard	Client Documents Needed for Appointment #117		TPs - Volunteers ▾
<input type="checkbox"/> B Becky Santiago	Client Documents Needed for Appointment #107		TPs - Volunteers ▾
<input type="checkbox"/> G Gabriella Cipriani	Client Documents Needed for Appointment #85	Overdue	TPs - Volunteers ▾

## 5.2 Card View:

Card view showing two tickets. The first ticket is highlighted with a red box and an arrow pointing to it. The second ticket is also visible below it.

6. 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)

\* All tickets > 107

☆ Reply **Add note** Forward Close Merge Delete

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

7. 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:

Discussion

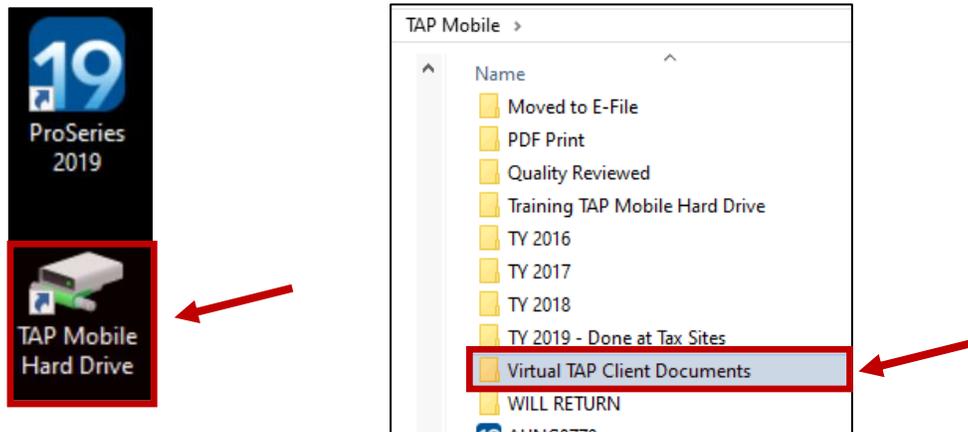
Ticket: Test - Virtual TAP Training

Any teammate with access to this ticket can view this discussion

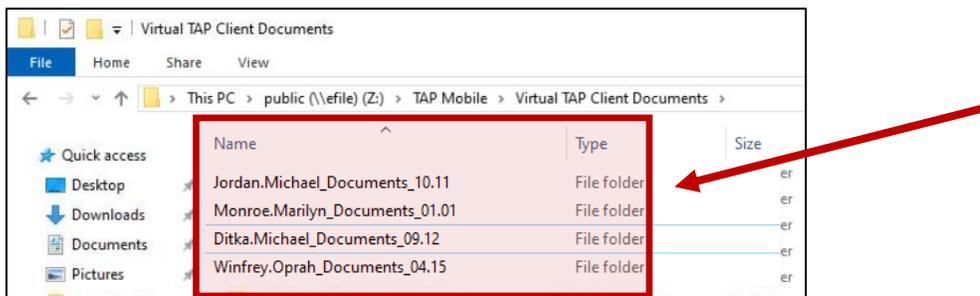
Use this feature to add notes to others working on the return.

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- Once you open the client ticket in [Freshdesk](#), you'll be able to see the client's contact details (including the names of the clients you are assigned to review that session).
- In your second chrome tab, which is running your [Zoho Assist](#) Connection, you will open up the client file that matches your client's contact information.
- Click on the "TAP MOBILE HARD DRIVE" and then open the folder "Virtual TAP Client Documents" to open the folder where the completed client files are stored.



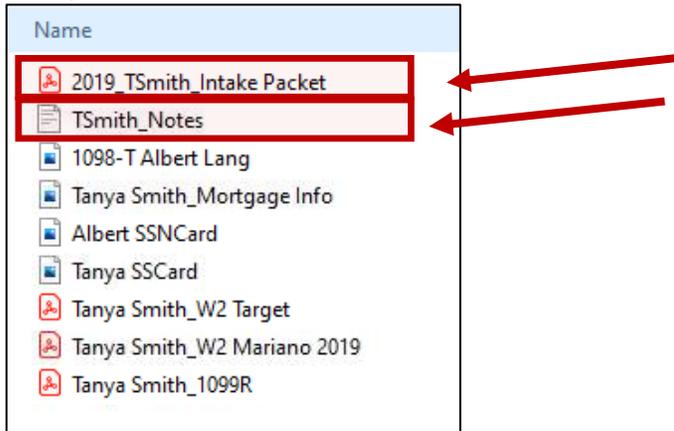
- Your client's file will be listed in alphabetical order by last name, with date that their process was started, at the end of their file name. (Ex: **Winfrey.Oprah\_Documents\_04.15**)



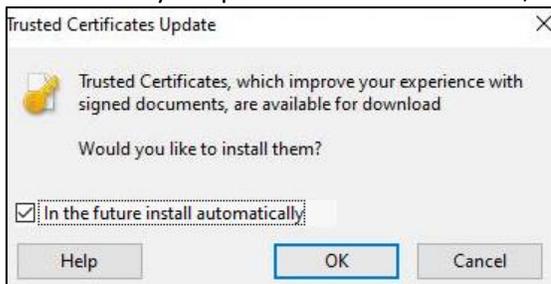
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- Open up your client's folder, and you will see:
  - Client Intake Packet (contains the modified 13614-C, Client Agreement, and IRS Form 14446)
  - All Client Tax Documents and Identification Documents
  - Client Notes Document (this is where Case 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)**

Example of Client File Contents:

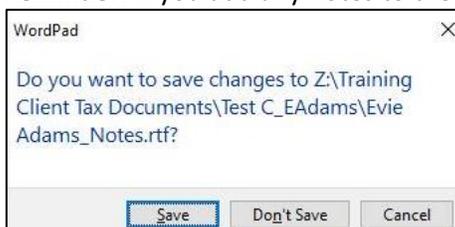


**Note:** When you open the Intake Document, if you see the following prompt, click “OK”



- 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!**



- After you have finished preparing the tax return, please return to your [Freshdesk](#) tab.

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15. Open up the [Freshdesk](#) ticket for the client you have just completed and click on “Add note”



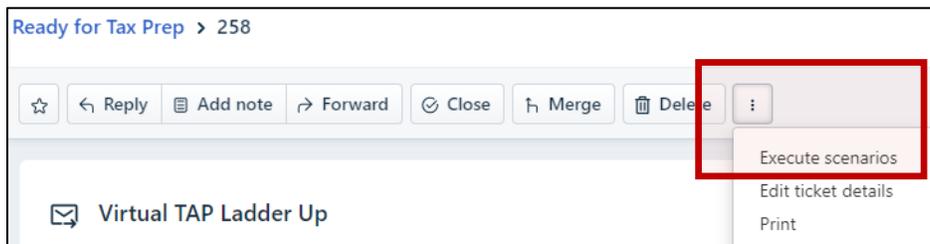
Enter only the following information into the note:

- 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)

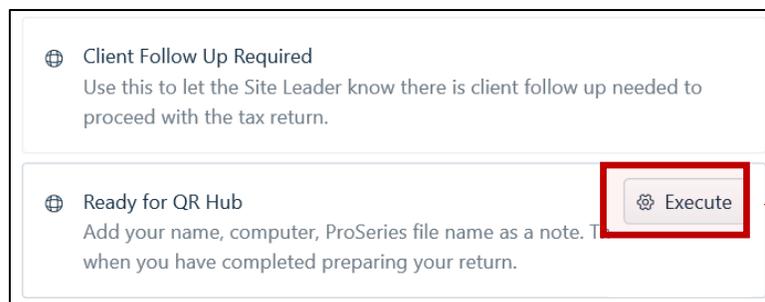
16. Click “Add note” at the bottom right of the ticket to make sure this information is saved into the client ticket.



17. While the client ticket is still open in [Freshdesk](#), navigate to top of the 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.

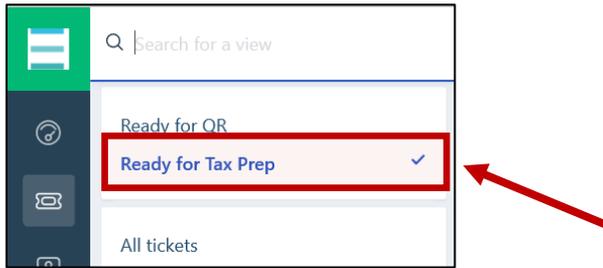


18. From the right-hand list of Execute Scenario options, select “Ready for QR Hub” from the menu, and click “Execute.”

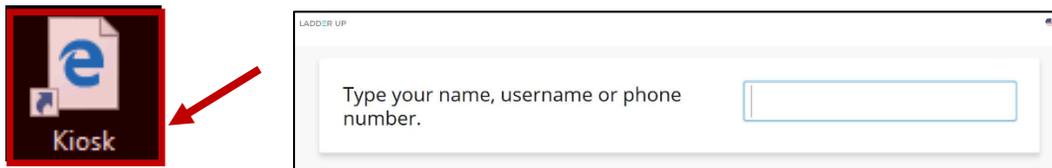


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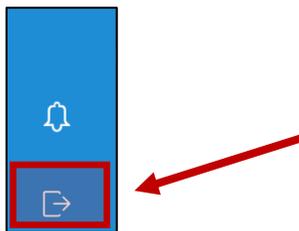
19. In [Freshdesk](#), return to view the next client ticket by clicking “**Ready for Tax Prep**” in the top left corner of the screen.



20. When you have finished preparing all returns for the session, please make sure to clean up your Zoho desktop by closing out of any documents or files you opened during your session.
21. Log out of the session on Volunteer Hub by launching the VHub Kiosk on the Zoho desktop and signing out at the end of your session:



22. 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.)



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## **Reminders:**

- Please make sure to always update the client ticket 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](mailto:volunteer@goladdeurp.org), or by calling 312-409-1555, ext. 6.

## **Troubleshooting:**

### *Missing Information:*

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:*

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.