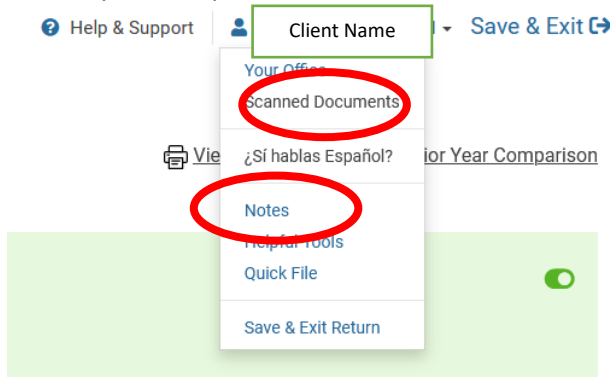


For best experience, use Google Chrome.

Make sure that you check into the meeting on GoToMeeting using the code from your volunteer confirmation. Note: the code is different for each volunteer session! The link/code will look something like: <https://global.gotomeeting.com/join/717171717>

For each client

1. You will be assigned a Virtual Exit account (1-9) during the Check-in Meeting, Log into GoToMeeting (global.gotomeeting.com) using your assigned “virtualexitnumber”.
Login example: virtualexit1@ladderup.org
2. Once in the GoToMeeting account, click “One-Time” to the left of the screen and click on the first meeting for your registered time. *Here you will see the client’s name.* Also note the “site” for the client (i.e. River North, Springfield, etc)
3. Log into TaxSlayer using your personal credentials (username and password) specific to the client site (i.e. River North, Springfield, etc)
<https://vita.taxslayerpro.com/ProAvalon/CoreLink/Index>
Confirm the tax year that you are reviewing at top right of the screen and click client search.
4. Click “Client Search” and locate client’s tax return. Click “Select” to open up the return.
5. Once inside the client’s profile, the client’s name will be at the top. Click the client’s name and select “scanned documents” from the drop down. Download the client documents (but do not save to your computer).



- a. Ensure that all client agreements are signed (There are three pages that should be signed).
 - b. Ensure that all tax documents are for the year being reviewed.
6. Also, under the client’s name, you may find “Notes” made by the intake, preparer or reviewer. Review the Notes by double-clicking on each Note found.
 7. On the left side of the client profile in TaxSlayer, click “Summary & Print” to access the clients 1040. Click “View /Print Return” to access the PDF Version of the return.

The screenshot shows the 'Tax Return Summary' page. On the left sidebar, the 'Summary/Print' option is highlighted with a red circle. The main content area features a green header for 'REASONS FOR NO EARNED INCOME CREDIT (EIC)'. Below this header, there are four blue links: 'There are No Qualifying Children Listed.', 'Taxpayer's Social Security Number is Not Valid.', 'Your Earned Income is Greater than the Earned Income Tax Credit Limits.', and 'Your Adjusted Gross Income is Greater than the Earned Income Tax Credit Limits.' The 'View/Print Return' button in the top right corner is also circled in red. At the bottom of the main content area, there are 'BACK' and 'CONTINUE' buttons. The 'Summary View' and '1040 View' buttons are visible at the bottom right of the page.

- a. Review the return to ensure that is accurate based on the scanned documents (Check client's basic info, income, credits applied, etc.) and Notes.
8. Navigate back to Go-To Meeting and Start the meeting that for your client. *Please make sure that you are in the "One-Time" meeting discussed in Step 1.*
 - a. Begin Sharing your screen once you start the meeting so that you are prepared for the walkthrough with the client. You will likely want to share the screen with the PDF of the tax return.
 - b. The client must also share their camera in order to verify their identity to their photo ID.
9. Once the client has entered the meeting, make sure that the client can see the 1040 that you are sharing (*if the client is on a mobile device, they may need to turn their phone or tablet to the side and swipe to the right to see the shared screen*) and then began reviewing the 1040 with the client.
 - a. Review the client's basic information at the top of the Return (*the client is responsible for the accuracy of this information*).
 - b. Review the client's income and deductions to ensure that the figures are what they expect.
 - c. Explain the clients refund and what the refund is composed of. If the client is choosing direct deposit, *make sure the client verifies their direct deposit information.*
 - d. If the client owes, ask if they want that to be mailed.
 - e. Ensure that the client does not have any other questions.
 - f. Discuss whether it will be paper filed or e-filed.
 - g. Let the client know that they can track the status of their return on the IRS Website ("Where's My Refund").
 - h. Let the client know that they will receive an email following the call regarding E-File signature pages within a week, if the client is planning to E-File.
10. Following the meeting with the client, open the client's tax return again in TaxSlayer. Navigate to the "E-File" section of the client profile on the left side. Click "Save" and "Continue" until you reach the "Submission" page.
11. Once on the submission page, scroll to the bottom and update the Status to "Is Complete".

Return/Transmit Status

Is Complete

Ready For Review

Approved

Failed

Approved

Return Tag(s)

Advanced

Rideshare

1-5 Documents

Virtual Exit Adv

12. Also, on the "Submission" page, update tags to "Ready for E-File Pages" or "Paper File Needed".
 - a. If a hard copy is requested, update the tags to "Hard Copy Requested".
13. Click "Save and Exit Return"

If you have any questions, please call or text the Site Manager Google Number:

(773) 257-3318