GYR – TAX PREPARER CHECKLIST

1. Log into the Hub with your assigned log in credentials.
   - https://www.getyourrefund.org/en/hub/sign_in
2. Go to **My Clients** page in the Hub to see your assigned clients for the day.
   - **The site manager will assign you clients tickets the night before.**
3. Click and open the first client ticket that appears.
4. Navigate to the Documents page within the client's ticket.
   - You'll see all the tax documents and IDs/SS Cards the intake specialist uploaded.
   - You can view these documents in your browser: **do not download** any documents.
5. In the **Documents** page, open Form 13614-C.
6. In the client's ticket, go to **Notes** and check internal notes.
   - You'll want to see if the intake specialist has added any internal notes about edits made to the intake sheet.
   - **Always** check for internal notes before preparing the return.
   - As you prepare the return, add internal notes about how you prepared the return, especially if something is uncommon.

If you need additional tax documents from the client, you can request more information through the Hub. Follow the steps below:

- First, change the status to **Information requested**.
- Second, click **Update**. A pre-generated message will appear.
  - Editable list of documents, link to client portal, and personalized signature.
- Finally, add an internal note if needed, and **send** the message.
  - When the taxpayer responds with the information, the return will move back to a "**preparing**" status.
  - Once the clients submit requested files, they'll appear on the client's documents page as type "**other**".

7. Once you have verified you have everything to start the tax return, you must change the status in the client's ticket in the Hub.
   - Change status to "**Preparing**" under Tax prep from the drop-down menu on the top right corner of the Hub, next to the tax year and tax certification. Then, click **Update**.
8. Open a new window tab, log into TaxSlayer to begin preparing the client's tax return.
   - https://vita.taxslayerpro.com/ProAvalon/CoreLink
   - **Reference the Tax Preparer Checklist:** click here to view
9. After you have finished preparing the return in TaxSlayer, you must change the status on the ticket in the Hub.

- **Go back to the Hub,** change status to "**Ready for QR**" under Quality Review from the drop-down menu on the top right corner of the Hub, next to the tax year and tax certification.
- A client message will be generated, you will choose the contact method option (Email or Text Message) to let the client know their return is moving along.
  - You will have a chance to add internal notes, if any.
- Then, Click **Send**.

10. Unassign yourself from the client's ticket!
    - While still being in the client's ticket, navigate to the top right-side of the page.
    - Click on your name and a drop down menu will appear.
    - Select the blank option, **first choice on the list**.
    - Then, click the green checkmark for it to update.
11. You will repeat these steps until you are done preparing all your assigned tax returns.
12. **Sign out** from the Hub.