GYR – QUALITY REVIEW 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. Be aware of the client's QR call time slot – this can be found on the **Client Profile** page within the client's ticket, under **Basic Info**.
5. Change the status from "**Ready for QR**" to "**Reviewing**" in the drop-down menu on the top right corner of the Hub. And click, **Update**.
   - 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**.
6. 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.
7. In the **Documents** page, open Form 13614-C.
8. In the client's ticket, go to **Notes** and check internal notes.
   - You'll want to see if the Tax Preparer has added any internal notes about edits made to the intake sheet.
   - **Always** check for internal notes before reviewing the return.
9. Now that you have the documents needed to review the return, login to TaxSlayer and find the client's return. https://vita.taxslayerpro.com/ProAvalon/CoreLink
   - Add to the **NOTES** section if you make any changes in the Hub. It's important to have a record of what every volunteer did to the return, and what changes were made.
     - **Reference the** QR checklist here
     - **Do not** exit from the tax return, stay on the **Submission Page**.

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**".

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10. Once you've completed reviewing the return in TaxSlayer, you will need to get ready for your Quality Review call.
    - To do so, from the **Submission Page** in TaxSlayer, under **Print Tax Documents**, select the **TAXPAYER COPY PRINT** option.
        - **You will need to allow pop-ups and redirects from VITA.taxslayerpro.com**
        - A new window tab will appear with a PDF of the client's tax return.
11. Go back to the Hub and change the status to "**Ready for all**" under **Quality Review** from the drop-down menu found in the top-right corner, then click **Update**.
    - A pre-generated client message will appear, and you will choose the Contact method option (Email or Text message).
    - You will be able to edit the message – Change the **REPLACE ME** portion to the time slot they chose which will appear right below "**Preferred Interview Time**".
    - Remove **"If this time doesn't work for you, let me know and we'll reschedule"** line.
        - **We will <u>NOT</u> be rescheduling clients.**
    - Add an internal note if needed and **send** the message.
12. To initiate the call, click the "**Call**" button on the client's profile page under **Primary Contact Info** within the client's ticket.
    - Enter **your phone number** – You'll make the call from your personal phone, but the client will not be able to see your phone number.
    - Then, click **Call**.
    - You'll receive a call, follow the operators' instructions, and it will connect you with the client.
13. Start the call by verifying their identity.
    - Ask **"Could you give me the last four digits of your SSN so I can confirm your ID?".**
14. Review the tax return in detail (line-by-line) with the client.
    - Add internal notes as needed during the call, in the **NOTES** section.
15. Once you have completed the quality review call with the client, **Save** the client's return onto your computer.
    - The save icon is located within the PDF on the top-right corner or **CNTRL + S**.
    - File Name: Client's last name along with the last 4 digits of their SSN. (Ex: SMITH1234)
16. Go back to the Submission Page in TaxSlayer, under **Print tax Documents**, select the **Print Form 8879 Only** option.
    - A PDF pop-window will appear, save the file onto your computer.
    - File Name: Form 8879 along with the client's last name. (Ex: Form8879-SMITH).
17. Once you have these files saved onto your computer, you'll need to upload them into the client's ticket through the Hub.

18. You'll need to make the Final Tax Return and Form 8879 available to the client on their client portal.
    - To do so, you'll upload the client's Final Return and Form 8879 (unsigned) in the client's documents tab.
        - These are the files you already saved onto your computer!
        - They must be uploaded separately.
    - In the Documents tab, click Add document.
    - Select Choose File and browse for the client's return you already saved. (Ex: SMITH1234)
    - Document type: Final Tax Document
    - Tax Year: Select the year it corresponds to.
    - Click Save.
19. Repeat the steps above to upload Form 8879 (Unsigned) in the documents tab.
    - Document type: Form 8879 (Unsigned)

Only documents with a filetype of Final Return, Form 8879 (Unsigned) will be visible to the client.

20. You'll request an e-signature on the return. Please follow the step below:
    - First, change the status to Signature requested
    - Second, click Update. A pre-generated message will appear with the client needs to review and how to sign.
    - Edit the message box, if needed. Add any internal notes, if necessary.
    - Finally, submit the message.

Note: If the client has multiple years of returns to sign, they will need to sign each one individually. You'll want to upload separate Form 8879s for each year of returns.

- ❖ Let's say the client has two years of returns, 2020 and 2019. You'd follow the same process as you would for one 2020 return, but you'd add two more files to the client portal:
    - 2019 Form 8879 (Unsigned)
    - 2019 Final Tax Return
- ❖ Make sure you assign the proper year label to the form when you upload it to the client portal. Then, when the client accesses their portal, they'll have options to sign for multiple years.

21. Unassign yourself from the return!
    - While still being in the client's ticket, click on your name.
    - From the drop-menu, select the blank option. (First choice on the list)
    - Then, click the green checkmark for it to update.
22. Sign Out from the Hub.