

GetYourRefund Hub Guide Process for 2022



United Way of Tucson
and Southern Arizona

If you have your Live Hub login and would like to begin working on returns, please follow this Hub Guide.

Notes for Tax Preparers

- When you login to the Hub, you will see ALL of the clients.
- Preparers should look for a client whose status is **'Ready for Prep'** and is NOT assigned to a volunteer.
- Please work on clients on a first-come, first-serve basis by sorting by the 'Created At' column.
- When you open the client's ticket, you will first assign yourself to the ticket.
- Once assigned, then begin reviewing the information and starting the return in TaxSlayer.
 - NOTE: **Valet Returns will need to be completed in TaxSlayer under the site that they were scanned in at.** Please sign into TaxSlayer under the corresponding site code. All virtual volunteers will have a TaxSlayer login for each site.
- When the return is complete in TaxSlayer, you will need to change the status to 'Ready for QR' AND unassign yourself.

Notes for Quality Reviewers

- Quality Reviewers should search tickets by the **'Ready for QR'** status and select a return that is not assigned to another volunteer.
- When the QR is complete, the volunteer will add the 8879 to the client's Hub ticket and add QR notes.
- Assign the return to Shannon for the QR call.
- When QR call is complete and 8879 is signed, the Hub ticket should be marked as **'Ready to e-file.'**

If you run into issues, please reach out to vita@unitedwaytucson.org