Clinic Guide

Get comfortable!

1. Make sure you have a snack/water/tea, any computers/phones/tablets you'll be using for clinic. Grab your physical copy of the 4012 if you have one, and have a calculator handy. Take a deep breath, this will be fun!

Open up the Volunteer Portal

2. Use the links to access the Hub, TaxSlayer, the 4012, and the Supplemental Intake Form

Sign in to the Hub

3. Go to My Clients
4. Open each ticket and determine the appointment time. This will be on the Client Profile tab under Basic Info, listed as Preferred Interview Time
5. Start working on the ticket with the earliest appointment first
6. Review the Basic Info, Messages, and Notes tabs first. Take note of the conversation history with the taxpayer, any notes from Site Coordinators, the preferred name of the taxpayers, etc.

Review the uploaded documents

7. Start with the 13614-C. Are there any missing fields? Blank questions? Based on how the form is filled out, what documents are you expecting see?
8. Open the remaining documents. You should see SS cards, IDs, health insurance documentation, and income documentation. Rename each document according to the File Naming Conventions on the Volunteer Portal
9. Ignore all consent forms, 14446, 15080, and the Optional Consent
10. Cross reference the 13614-C and the documents uploaded. Is there anything missing? Is there a partial document? Do you have questions for the taxpayers based on what you see?
11. When complete, update the status to Intake: Ready For Call. This will open up a Take Action screen. Customize the pre-loaded message to let the taxpayer know you will be calling them soon.

Get ready for the call

12. Open the original or preliminary 13614-C and the Supplemental Intake form. You will be checking boxes and entering information on these forms during your call with the taxpayer

13. Go to the Client Profile tab, find the Primary Contact Info Section, and hit Call next to the taxpayer's phone number. On the Call Client page, enter your phone number. You will get a call from GYR, hit any number to continue. This will connect you to the taxpayer
14. IF THE TAXPAYER DOES NOT ANSWER:
    "Hello, this is [your name] calling from Community Action's free tax program. I have a few questions to ask you before we can prepare your return. I will send you a follow up [text or email] to see if there is a better time to reach you. Thanks!"

    During the intake call
15. "Hello, is my name is [your name] and I'm calling from Community Action's free tax program, is [taxpayer] available?"
16. "Can you confirm the last 4 digits of your social security number for me?"
17. "I'm going to start by asking you a few questions to make sure we have all the info we need.

    Once we're done talking, I will begin preparing your return. If I have more questions, I may call you back or follow up with a text/email. When I've finished preparing your return, I'll hand it off to someone else to get a second set of eyes on it. We want to make sure the return is accurate. That person will get in touch to schedule a time for you to review the return and sign it.

    Are you ready to get started?"
18. First, go through the information on the 13614-C. Confirm names, addresses, and birthdates have been entered correctly. Make sure all the relevant check boxes on the first page have been completed
19. Complete the dependency questions on the bottom right corner of page 1 for each dependent
20. Go through the questions on page 2. Make sure every question is marked Yes or No.
    Note: You don't need to ask each question in its entirety. If it is a simple return, try combining the questions into a list.

    "Alright, I have some questions here that I need to ask, I think the answers to most of these will be no, but stop me if any apply to you. Did you have any tip income, scholarships, interest or dividends, did you itemize last year, have any alimony, self-employment income, virtual currency payments, did you sell any stock or bonds? No? Okay, thanks."

21. You do not need to ask the demographic questions in the last section on page 3
22. Next open the Supplemental Intake Form. We need to complete this for every return. You do not need to ask every question. The most common questions are on the first page. Go through questions 1-6 for each taxpayer, and then ask the additional questions as needed.

Wrapping up the intake call

23. Once you've been through the 13614-C and the Supplemental Intake Form, make sure you follow up with anything that came up during the call. Remind the taxpayer of documents they need to locate and upload, send them the link to GYR, etc.
24. Explain that you will start preparing the return and will get back in touch if you have any other questions
25. Download the completed 13614-C and Supplemental Intake Form to your computer. Upload the new versions into the Hub. Confirm that the uploaded versions have your edits. Delete the forms from your computer.
26. Rename any new documents, including the 13614-C and Supplemental Intake Form. Make any relevant notes in the Notes tab.
27. Change the certification level for the return in the Hub based on the answers to the 13614-C

Preparing the return

28. Change the status to Tax Prep: Preparing, but do NOT send an auto message to the taxpayer
29. Go to TaxSlayer and enter the information for the return based on the documents and intake forms
30. Ask questions! Let a site coordinator know if you're stuck or confused. Message the taxpayer if you need any additional information.

When you've finished a return

31. Change the status to Quality Review: Ready for QR
32. Let a site coordinator know, and wait for them to complete the quality review. While you're waiting, get started reviewing the documents for your next taxpayer
33. The site coordinator will check in after they've reviewed the return to see if you have any questions or to ask questions to resolve an issue

You're all done! Move on to the next taxpayer